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# **L. Department of Transportation**

## **Office of the Secretary of Transportation**

# South Carolina Transportation Marketing Manual

September 1980

Prepared for  
South Carolina  
Office of the Governor





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# South Carolina Transportation Marketing Manual



for the Office of the Governor  
Division of Economic Development  
and Transportation

prepared by  
Carter·Goble·Roberts, Inc.  
September 1980

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## PREFACE

The rebirth of transportation marketing in the United States is relatively recent and rapidly growing in terms of both volume and the quality of the materials and programs designed and implemented. The downturn in general transit ridership began in 1929 and continued steadily until 1972. That trend has been reversed and, while the numbers are still not overwhelming, it appears that the increased ridership is real and here to stay.

Transportation management planning and marketing professionals have made a substantial contribution to the transit ridership increases in recent years through the development of a workable marketing process and procedure, and through the design and implementation of creative, imaginative approaches to the unique problem of selling transit services to an auto-oriented society.

The South Carolina Governor's Office, Division of Economic Development and Transportation, has sponsored the preparation of this marketing manual specifically to aid the transit systems of the State with the best transportation marketing knowledge, examples and procedures available in the United States. As such, the manual includes some of the best ideas and procedures that could be found from throughout the country. A special thanks is due to U.S. DOT and the various State DOT's and transit systems that permitted their materials to be reproduced herein.

As you read this manual, you will find that transportation marketing goes far beyond mere advertising or promotion. It is a systematic approach to the marketing management of a transit system, with the primary objective of better service for more customers. While the manual is designed to cover the planning, development, execution and refinement of a marketing program in sequence, the reader may also use only portions of the document, as needed.

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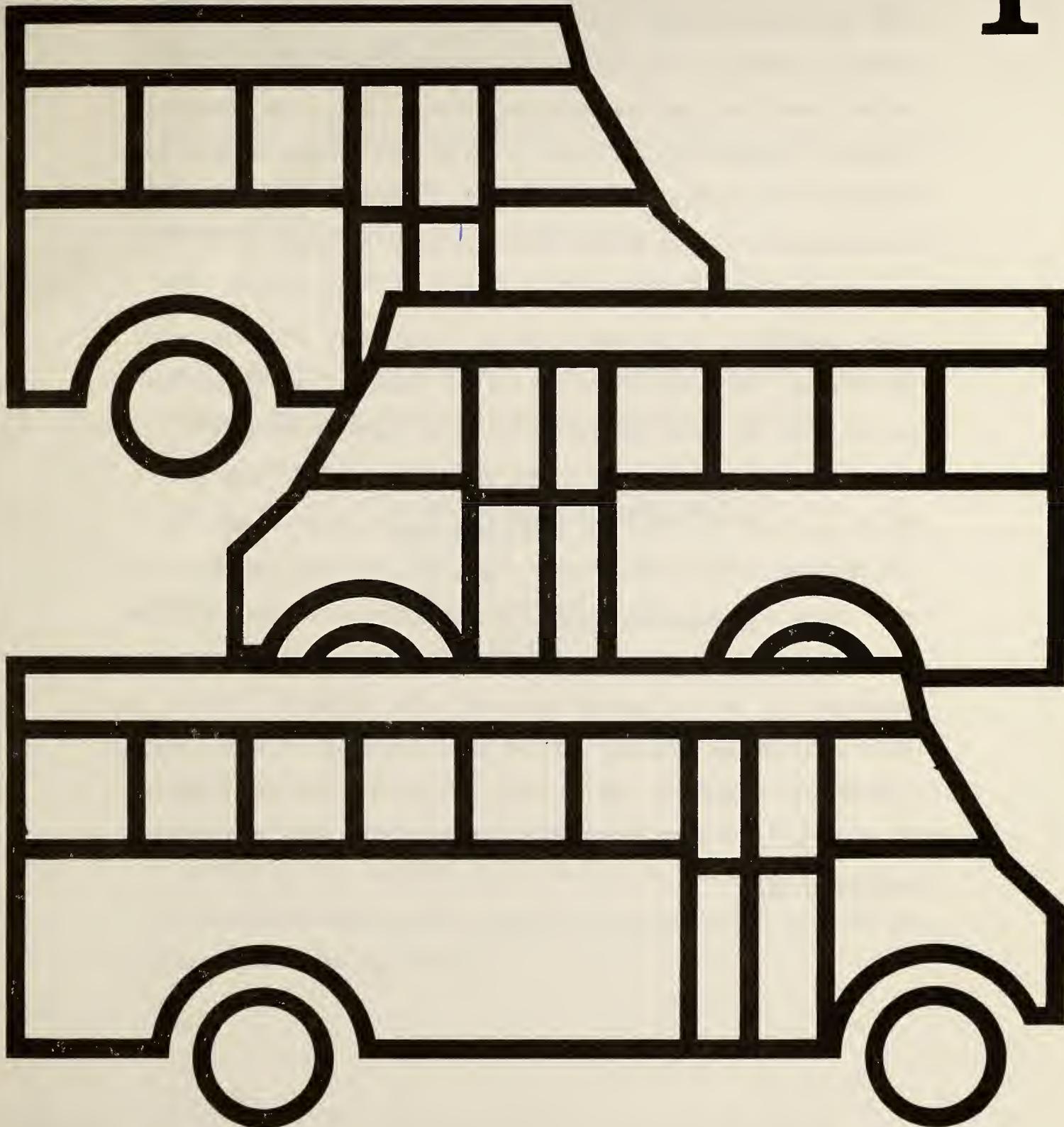
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# Marketing

1



## MARKETING

### An Introduction

Many experienced business executives believe that marketing means advertising or promotion. However, these are only single elements in a properly developed complete marketing program. Many other considerations are involved that are vital to the overall management of an organization. If marketing can be reduced to a single word, particularly with respect to transportation, that word might be image.

Image, in effect, is the totality of all things that a transportation system does. According to one definition, image is "the impressions of the policies, personnel and operations of an organization that is imparted to the employees and to the public." Image includes such things as the visual identity of the system--its graphics, products, architecture, advertising, signage, vehicles, and user information system. Image also includes how the transportation system deals with public policy; how it responds to the community; and how it responds to government, as well as how employees deal with the public, that is, their attitude and know-how. All of these components of image, whether good or bad, converge in the consumer's mind and define the direction of the countless "yes" and "no" transportation decisions that people make every day.

A good image is no accident. Rather, it is the result of a carefully planned and executed marketing program. However, even with a good image, transportation system marketing must get the potential client to make the first move to actually use the system. This is where many marketing efforts fail.

This manual is designed to provide you with guidance in the development of a marketing program for your organization. We believe that after reviewing it carefully, you will understand the need for and importance of an ongoing marketing process in your organization.

For a transportation system with a well-developed marketing program, managers with experience might define marketing to include:

- . Service analysis and planning
- . Service change implementation
- . Market research
- . Advertising
- . Promotion
- . Rider information
- . Customer and community relations
- . Special sales

Thus, it is important to realize that the marketing function is an integral part of mapping business strategy. It plays a unique role in planning overall organizational direction and actions to achieve organizational goals. Marketing, as a result, is a critical component of the successful organization, and requires formalization with the management structure and process.

Whether an organization offers goods or services, it shares with all organizations the following critical needs:

- . To identify what it wants to be and to whom
- . To set realistic goals and objectives
- . To determine the reliability of goals
- . To understand the nature of the marketplace and the public it serves
- . To enhance productivity

Marketing intelligence dominates the approach to planning. Only through the accumulation of data in both quantitative and qualitative form can a marketing plan be adequately developed and meshed with the tactics and programs needed for achieving strategic goals. Too many organizations suffer from a lack of such knowledge and are forced to rely on intuition and gut feelings that may be misleading. Past experience will not always tell what is going on in the present, and it is an unreliable guide to the future.

The consumer is the core of the market universe, the marketer's primary target. Consumers can be categorized into multiples of marketplace segments by demographic characteristics; by buyers or users of the service; or by influencers of the decision to buy. Organizational goals and policies must be brought in line with their requirements.

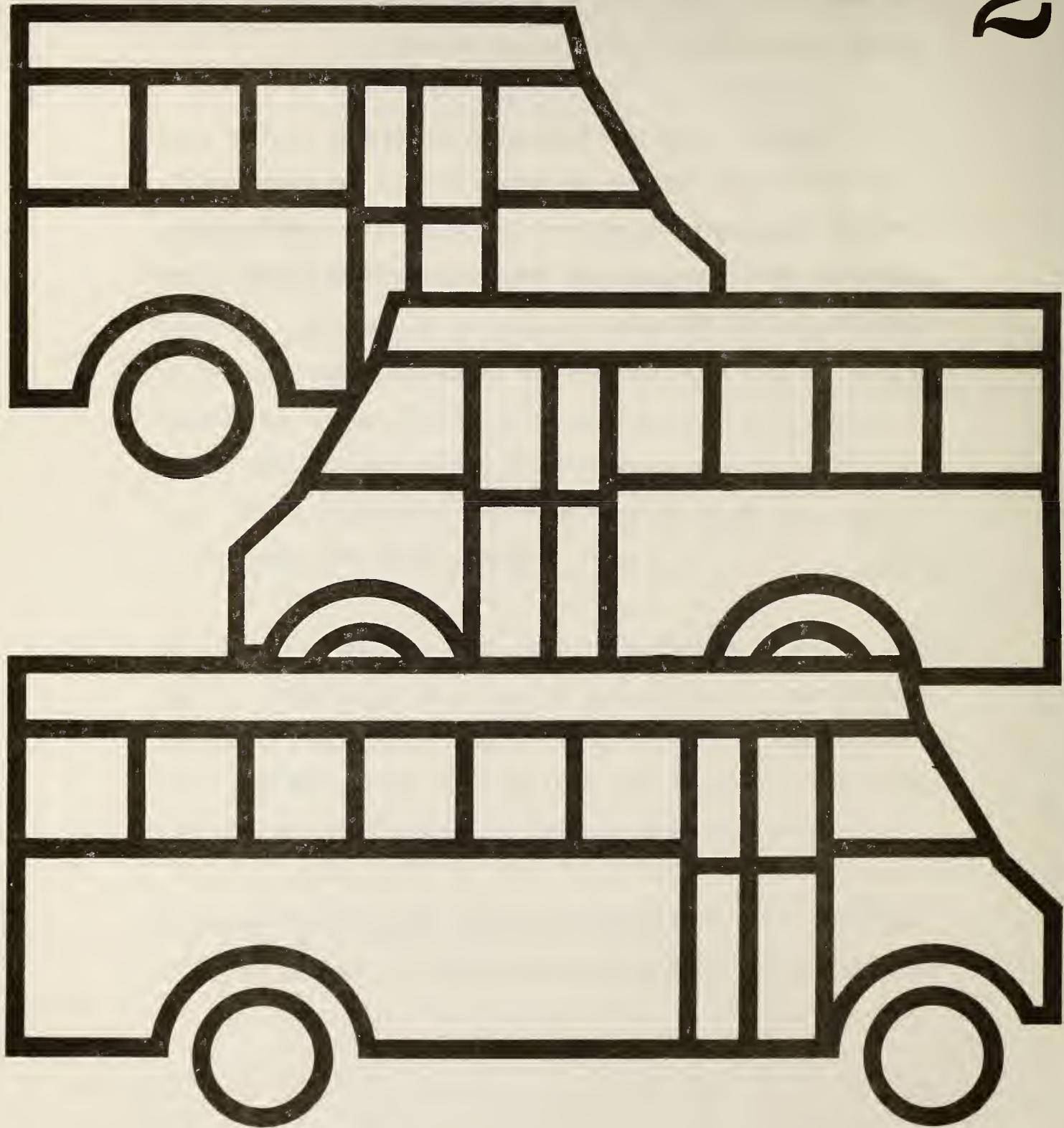
This manual considers the function of marketing in a transportation operations context. Its purpose is to bring before the transportation

systems in South Carolina and elsewhere a basic understanding of the need for and importance of marketing, to guide the user through the development of sound marketing programs and practices, and to insure that marketing is established as an integral part of overall transportation system management practices and procedures.

It is important to note that this manual has adopted existing procedures and concepts that were developed elsewhere and judged useful. Newly-developed materials and revisions of existing materials were added only when it was believed that improvements in clarity or applicability could be made.

Planning

2



## PLANNING

### The Position of the Marketing Function in the Planning Process\*

It should be stated at the outset that smaller transportation systems will assign most of the marketing functions to one individual, the chief executive officer. As a result, this presentation of the planning process and marketing function may appear somewhat elaborate. However, it is vital to note that the same basic procedures should be followed regardless of system size. System size and resources will dictate how modest and simple, or elaborate and complex, the planning and marketing effort may be. However, they should not affect the basic principles and procedures involved.

Planning is the preparation of a framework for guiding future actions. The guidance provided by planning takes the form of an allocation of specific resources (money, people and time), in specific combinations of activities (strategies), to achieve specific events and/or conditions (objectives and goals). Each of these elements of the planning process, as it relates to transit marketing, will receive specific attention in this manual.

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\*This section has been adapted, in part, from the Marketing Plan, Transit Marketing Management Handbook, April 1976, prepared for the U.S. Department of Transportation, UMTA, Office of Transit Management, by Grey Advertising, Inc., New York, and Lesco Associates, Washington, D.C.

There are three distinct levels of formal planning that may be undertaken in a transportation management environment:

Policy Planning - is long-range in scope (from two to five years) and provides overall guidance and priorities regarding the general objectives of the entire organization;

Program Planning - is mid-range in scope (from one to two years) and provides policy implementation guidelines in connection with the budget-approved cycle. The program plan provides a means for allocating limited resources to achieve specific goals consistent with the general objective(s) of the organization; and

Implementation Planning - is short-range in scope (usually one year or less) and provides a structure for achieving very specific events and performing very specific activities within a limited time frame and with limited resources. The keystone of implementation planning is the assignment of responsibilities and authority for the performance of specific actions.

Transportation management planning can, and does, take many forms.

Figure II-1 illustrates how a typical transit system might conduct its total planning process. The five-year transportation plan shown in this figure is the policy plan for the transit system; it should be updated on a regular basis (usually annually) to provide the general guidance for all planning activities within the transit system. The current-year system operating plan should then integrate all of the program activities with the transportation system. It is within the operating plan that management accomplishes the following:

- . Individual program plans (marketing, operations, etc.) are reviewed to insure consistency with the guidelines from the policy plan;

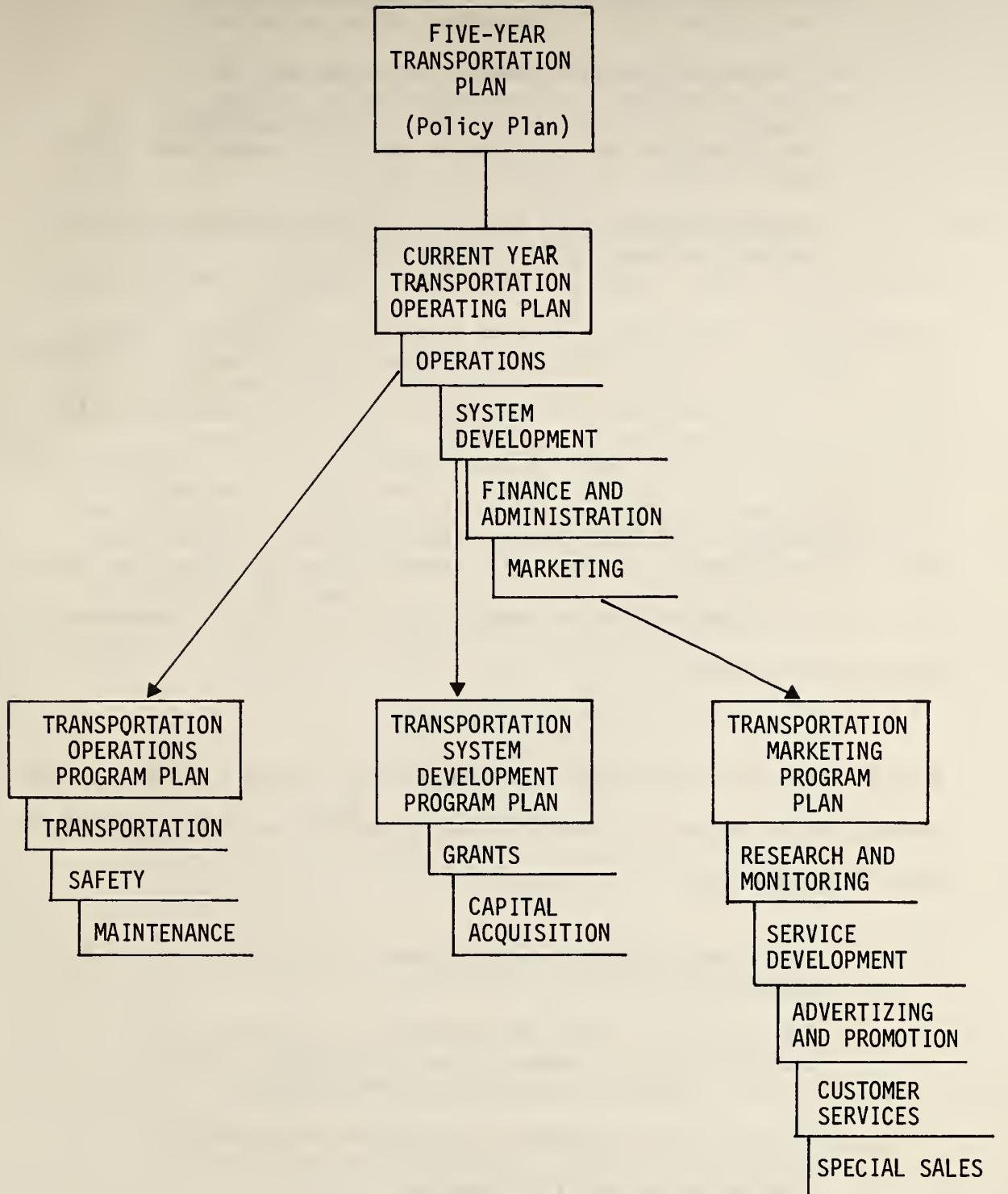


Figure II-1  
TRANSPORTATION PLANS

- Individual program plans are integrated to insure consistency with each other;
- Program goals and strategies are approved;
- Resources are allocated to the individual programs, and priorities are assigned to specific program elements; and
- The long-range policy plan is revised and updated to reflect the most current situation.

In a transportation system that has a thorough and responsive planning process, as described above, it is obvious that the transit marketing program does not stand alone. A good marketing plan will dovetail with all other planning activities. If a transportation system does not have a formal planning process, or if the planning is incomplete, there is all the more reason for the marketing unit to prepare a comprehensive marketing plan.

Even if there is no extensive planning activity in the remainder of the transit system, a well-prepared plan will benefit the marketing unit in the following ways:

- The marketing unit can coordinate, focus, and set priorities for its activities;
- The plan can provide the marketing unit with an excellent means of communicating its analyses, objectives, strategies, and resource requirements;
- The plan, once approved, can provide the marketing unit with the formal authority to proceed with its program and expand its resources;

- . The plan can be directly translated to an implementation or action plan; and
- . The plan can serve as the basis upon which the performance of the marketing unit and its program are evaluated.

Figure II-2 reflects the variety of activities that might be organized and carried out through the marketing program. Again, as pointed out above, this manual is designed to provide information and guidance to all transit properties, regardless of size. As a result, the variety of functions that might be carried out as part of a marketing program are extensive. In the smaller system, this elaborate organizational layout would not be warranted. However, the basic purpose and functions remain the same.

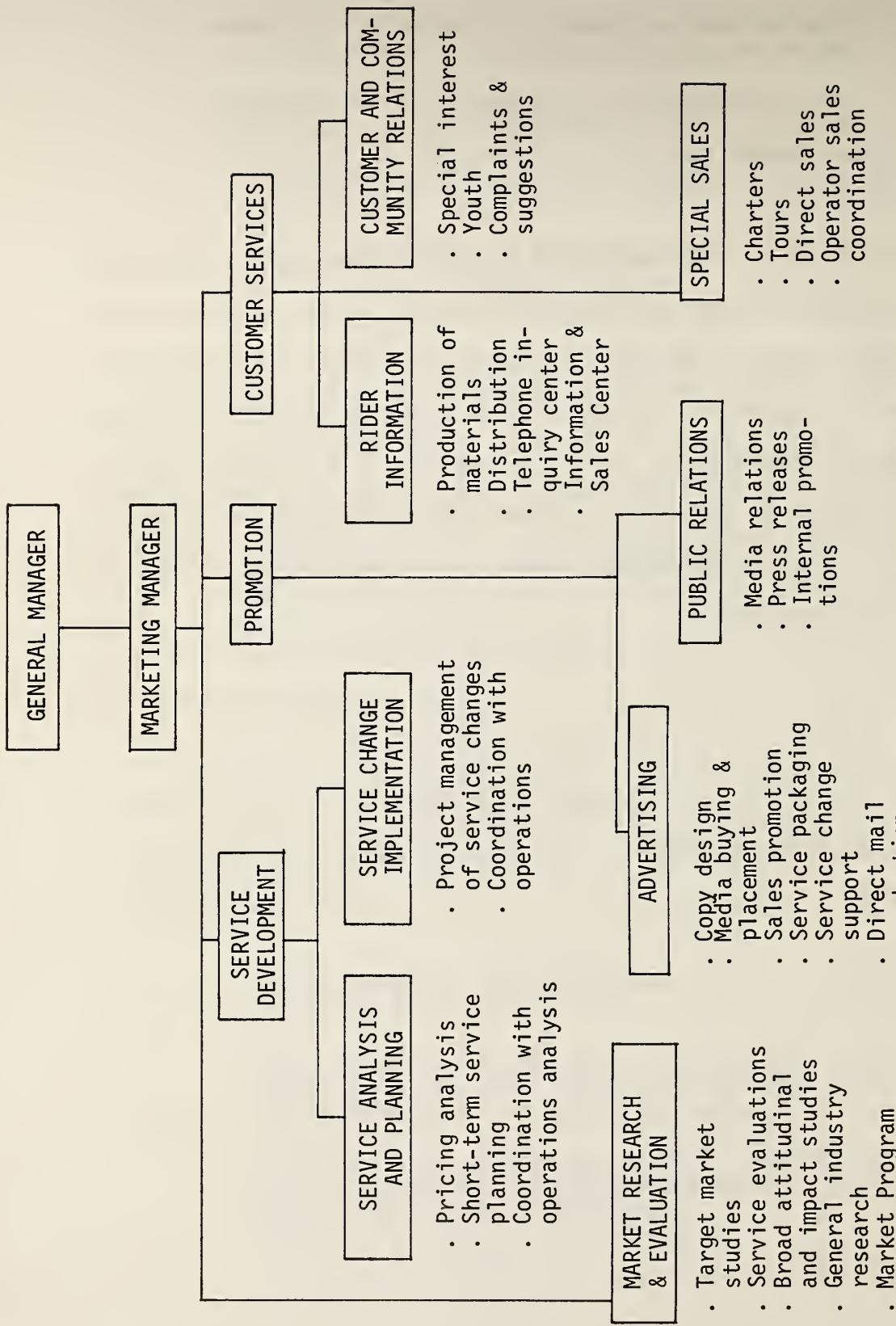
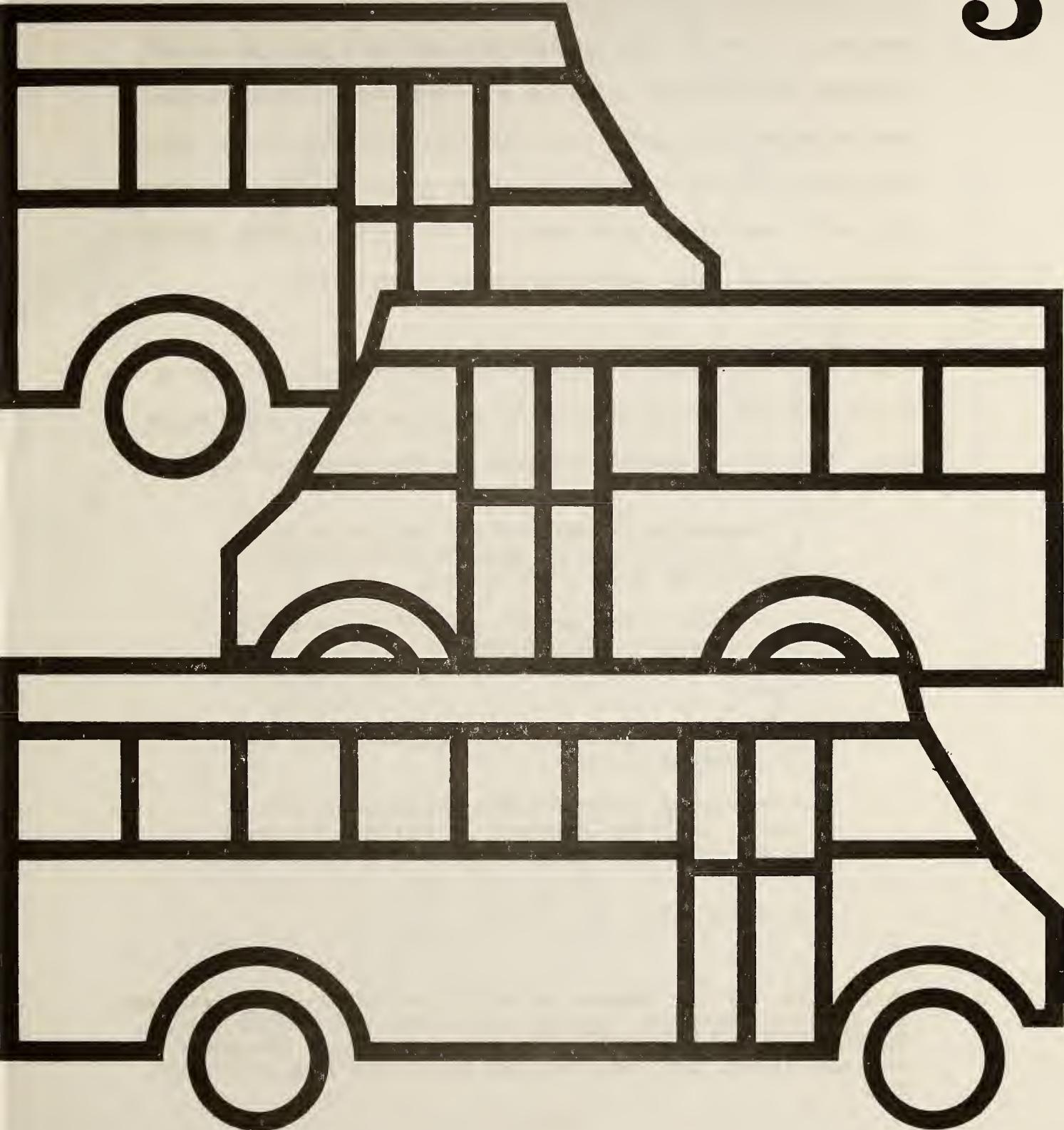


Figure 11-2 TRANSIT MARKETING AND FUNCTIONS

Source: Peter M. Schaur, Consultant; Boonville, Missouri.

# Organization

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## ORGANIZATION

### The Relationship Among the Parts of the Marketing Plan\*

The transportation marketing manager should employ a systematic approach to planning. The approach must provide a strong degree of structure to insure that marketing activities are well coordinated; that the marketing program is entirely consistent with overall system objectives; and that the marketing effort is monitored and evaluated with useful results being fed back into the overall planning process in general, and the future marketing program in particular.

Figure III-1 illustrates a comprehensive approach that will provide the needed structure and coordination for a transportation system of any size. The planning approach presented has five primary parts:

- A presentation of marketing problems and opportunities resulting from the research and evaluation of the existing system and programs;
- A statement of the specific goals of the marketing program based on the problems and opportunities identified and consistent with organizational objectives;
- A presentation of specific strategies for achieving the marketing goals;
- A description of the resource requirements (time, people, and money) necessary to implement the selected strategies and achieve the marketing goals; and
- An action plan.

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\*This section has been adapted, in part, from the Marketing Plan, Transit Marketing Management Handbook, April 1976, prepared for the U.S. Department of Transportation, UMTA, Office of Transit Management, by Grey Advertising, Inc., New York, and Lesco Associates, Washington, D.C.

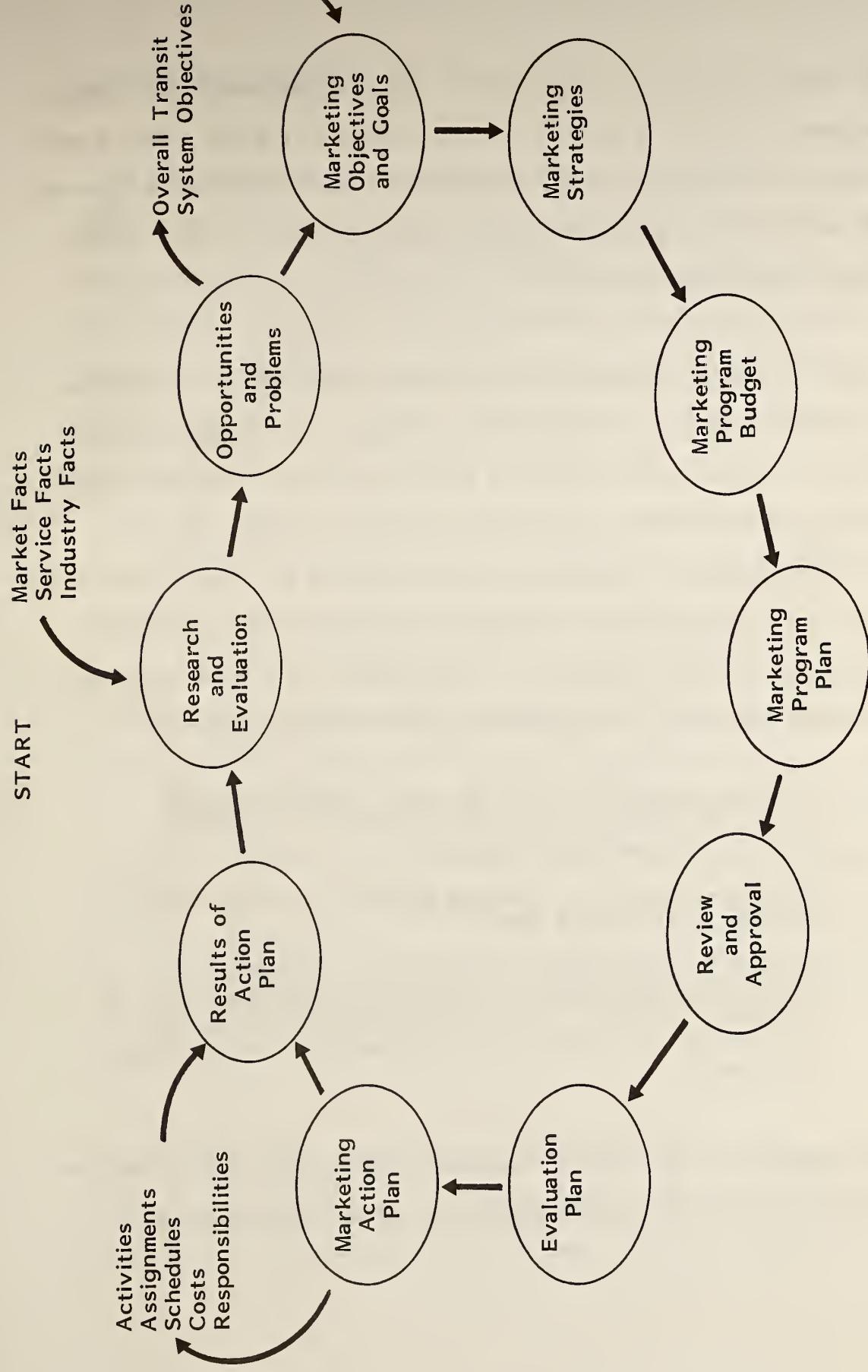


Figure III-1  
THE TRANSIT MARKETING PLANNING CYCLE

The Action Plan will be dealt with in the next section of this manual, prepared separately because of its importance as a guide. Before proceeding with a discussion of transportation marketing program planning, the definition of goals, objectives, and strategies, as used in this chapter, should be clarified.

A goal is a broad statement of long-term purpose, while an objective is a specific statement of short-term achievement. An organization will rarely have more than one goal in a given functional area, but will always have objectives. A goal will change very slowly, in an evolutionary manner; objectives change regularly and rarely survive for more than a year or two. A strategy is a specific approach to the accomplishment of an objective. In the context of a transit system, the three terms may be illustrated by the following examples:

Transportation Goal: Provide safe, reliable transportation services to all people in the XYZ metropolitan area at the lowest possible cost.

Marketing Objective: Increase off-peak ridership by 20 percent in the coming year.

Marketing Strategy No. 1: Through the development of suburban shoppers' special discounts and downtown free-zone fare structures, improve by 15 percent the utilization of public transit by non-working adults during off-peak hours.

The remainder of this section contains a brief discussion of the five primary parts of the transit marketing program planning process.

## Research and Evaluation

Effective marketing begins with an analysis of the market. Research, evaluation, and monitoring provide an ongoing inventory of all the factors that constitute the transit system's current marketing situation. It is also an analysis of the factors that caused the situation to develop. A comprehensive system review is an invaluable tool for determining ways to identify a transportation system's weaknesses, for ascertaining and developing ways to augment its strengths, for synthesizing the conditions that resulted in past successes and failures, and for assessing the probable effects on the transit system's marketing program of conditions likely to arise in the future.

Every relevant, ascertainable fact about the transit system--services, sales, programs, markets and users, etc.--should be assembled. Much of this information will already exist in the system records, be collected by market research studies, or readily attainable through general sources. In any case, the greater part of the effort required is a one-time occurrence because research can be subsequently updated with relative ease once constant evaluation and monitoring procedures are established.

The following list, although by no means definitive, indicates the types of information that will be required for the decision-making process involved in establishing marketing goals and objectives.

- What has been the system's record on service reliability and timeliness? By route? By market segment?
- What has been the system's safety record? By route? By market segment?
- What is the physical appearance of the fleet?
- Are the system's fares structured to encourage increased ridership?
- Are special and promotional fare structures effective in the target market segments?
- Are the drivers and telephone-information personnel market-oriented?
- What are the system's revenues? By months? By days of the week? By market area? By customer classes? By times of the day? Per capita? By routes? By special services?
- What are the expenses and profits of the system? By routes? By market areas? By customer classes? By month, day, time of day?
- What percentage of overall transportation purchases by consumers in the marketplace is spent on public transportation services?
- What are the major results of the system's market research analyses? By market trends? By market segments?
- What types of service development projects have resulted in substantial and lasting increases in ridership for the system? What types have failed?
- What have been the results of the system's advertising and promotion program? By reader/viewer/listener impressions? By size/length/frequency/schedule of ad units? By ridership increases?
- What type of customer service activities have had success in improving ridership? What types have failed?
- Who are the current customers of the system? By location? By income level? By age? By occupation? By size of family? By race?

- Who are the most promising potential customers of the system? By location? By income level? By age? By occupation? By size of family? By race?
- What factors most influence the decisions to use or not use the transit system's services? Convenience? Cost? No other choices?
- What is the average daily, weekly, monthly, and yearly amount expended by system customers? By customer class? By market?
- What are the attitudes of the customers toward the system? Toward the specific services?
- What events in process, or likely to occur, will influence the level of ridership?
- What is the market share of the system, versus competitive modes, for specific customer classes? In terms of passenger miles? In terms of numbers of passengers?

Other suggestions concerning data collection, maintenance, research and evaluation are set forth in the final section of this manual.

### Marketing Program Goals

After assessing the marketing opportunities and problems of the transportation system, the marketing plan should state the specific objectives of the marketing program. The marketing program objectives do not describe what is expected to happen naturally but, rather, what will be caused to happen as a direct result of the marketing program effort. The marketing objectives should be focused entirely upon service development, advertising and promotion, and customer services. Some guidelines for stating marketing program goals and objectives follow.

Goals Should be Important - The transit marketing program plan should have goals that are of relatively high and equal priorities. There may be many marketing program results that are desirable but not very meaningful when measured in terms of the overall success of the system.

Goals Should be Realistic and Attainable - Since the marketing goals will serve as the basis upon which the success of the marketing effort will be measured, it is essential that they not be based on wishful thinking or unrealistic hopes of the marketing staff. Ambitious goals that do not reflect the external limitations of resources or of the political environment are of no help in planning the marketing program.

Objectives Should be specific and, if Possible, Quantified - Objectives should not be stated in vague, subjective, or generalized terms, such as, "Increase system ridership." Better stated, a marketing program objective might be, "Increase ridership by six percent, to two million passengers annually." The more specific an objective statement is, the easier it is for managers to understand, approve, assign priorities to, and allocate resources for its achievement. Specificity also makes achievement of the objective measurable and more suitable for future evaluation. The specific quantitative targets for the objectives should be based on analysis supported by thorough research of the market facts.

Below are several example goals and objectives. Both good and bad examples are provided.

Goal: Improve the Public Image of the System

Improvement of the image is a very difficult activity to quantify. But if the image of the transit system is perceived as a marketing problem, it was most likely discovered in the course of a market research activity. Market research and evaluation can form the basis for making this goal statement more specific, e.g., "Improve the public image of the system by increasing the 'favorable' survey responses to 70 percent of all attitude interviews." Other specific measures of image include numbers and kinds of customer complaints/comments received and adverse letters and editorials.

Objective: Increase Ridership by Developing More Equitable Fare Structure

This objective is also difficult to quantify, but it may be possible to relate fares to objective criteria, such as miles traveled during peak and off-peak periods. Other possibilities would include changing the fare structure to increase fares during peak travel periods or replacing flat fares with a system of zone fares. As an example, a specific objective might be, "Decrease the cost per mile to the rider by ten percent during off-peak periods."

### Objective: Increase Ridership

This is much too broad a statement of intent to be of much use to the transit system. The objective could be better stated in any one of the following ways:

- . Attain a five percent increase in ridership throughout the system.
- . Increase utilization of the ten least traveled routes by ten percent.
- . Shift 500 non-work-related trips per day from peak to off-peak periods.

### Objective: Reduce Transit System Deficits

Again, this statement is too subjective and general. Even more important, there is a real question as to whether or not this objective is a marketing program responsibility. The reduction of deficits could be accomplished by increasing profitable ridership--clearly a marketing function. But deficit reduction could also be achieved by improving operating efficiency, cutting operating costs, or increasing the average fare, none of which is the primary responsibility of the marketing function.

It should be apparent that some marketing program goals are obvious, i.e., the need to increase non-peak ridership. Other goals are directly derived from the requirement to correct or forestall a deteriorating situation, such as an overall decline in ridership.

In addition, the marketing planning process must develop those marketing program goals and objectives that are not obvious, those that will become apparent only after a thoroughly creative analysis of the marketplace or from a disciplined search for, and pursuit of, opportunities. For example, an objective might be, "Increase ridership among workers who commute in large numbers to industrial parks to 1,000 passengers per day."

Development of such a marketing objective depends on a thorough analysis of business locations and travel patterns in the metropolitan area. It also requires some preliminary investigation into the disposition of the employers on such matters as in-plant transit information services, coordinated working hours, and perhaps even financial subsidies to employees. Some investigation and analysis must also be done inside the transit system to explore the feasibility of service developments such as route and schedule modifications to conform to the needs of the workers and employers who fall within the program activity.

Creativity in discovering the opportunity, performing the preliminary analysis, and developing and articulating the marketing goals and objectives can make them more specific and realistic to the transportation system.

## Marketing Program Strategies

After a set of specific, attainable, marketing program goals and objectives has been defined, the plan should describe in detail the strategies for action that will result in achievement of the goals. Thus, marketing strategies provide the basis for an action plan to formulate and carry out specific marketing efforts.

In almost every case, a variety of strategic alternatives will have to be considered in developing an approach to each marketing objective. However, each objective will have one, and only one, recommended strategy in the completed plan. For example, several strategies could be used to achieve the goal of increasing ridership by ten percent. A pricing strategy might entail lowering fares, but could result in a possible parallel reduction in the quality of equipment and service.

An alternative strategy could be to increase fares, while at the same time, significantly increasing service, quality of equipment, and performance in order to attract more riders. These two alternate strategies are, of course, diametrically opposite; nevertheless, depending upon local conditions, each could be effective in achieving the goal of increasing ridership. It should be apparent that no single strategy is appropriate in every circumstance.

It is critical to the success of the marketing program that, prior to the determination of a strategy, a careful evaluation be made to ascertain the specific needs and desires of consumers. This point emphasizes the need for carefully integrating all actions of the marketing plan so that each part can build upon the information and analysis contained in the other parts.

It is important to note that implementation of marketing strategies is not always purely a marketing function. It will frequently happen that achievement of a marketing objective will require the active participation of other transit functions in addition to the marketing function. For example, service improvements involving revised schedules or better equipment will most certainly involve the operations and finance functions. This participation by other system functions must be anticipated, and those other functions should be invited to participate in the planning process at an early stage.

In the development of a strategy to achieve an objective, the transit marketing plan should focus on four key marketing concepts: target marketing; competitive stance; buying incentive; and marketing mix. Each of these concepts is discussed in detail below.

Target Marketing - This key strategic concept defines in explicit terms the characteristics of the prospective user of the transportation system, i.e., the segment of the public that the marketing program must

influence. It is important to know where these people live; how they are distributed in terms of age, sex, and income; whether they are employed or unemployed; whether they are current riders or potential new users; and their potential willingness to abandon the use of the automobile in favor of public transportation. (An additional discussion of target marketing is presented in the final section of this manual, Implementation and Evaluation.)

Competitive Stance - This concept identifies the transportation mode against which the system chooses, or is forced, to compete. In almost all cases, public transportation competes principally with the use of the private automobile. Thus, a marketer's competitive stance must take this prime competitor into consideration in all decisions on strategy.

Buying Incentive - This concept affecting marketing strategy is the selection of those attributes and benefits of the transportation system that are most likely to motivate customers to use it. Marketing of public transit does not involve selling a tangible product; it is the total transportation service, not the bus or the train, that is important to the user.

Since people do not normally change their behavior patterns for only one reason, the buying incentive should be multi-dimensional. For example, the program may feature the comfort and ease of public

transportation in contrast to the strain of driving an automobile in city traffic and, depending upon local circumstances, may also point to the fact that it is less expensive to ride the bus than to pay for gas and parking. Thus, a sales proposition must be made to the potential transit customer.

It is important to realize that the sales proposition is more than just a part of the advertising strategy; it permeates every aspect of marketing. For example, if a major element is the physical comfort of riding the bus, the proposition should include the assurance that every rider will have a seat; that the drivers will be courteous; and, perhaps, that other amenities, such as airconditioning and adequate interior lighting, will be made available. Again, this emphasizes the need for integrating every aspect of the marketing plan; the sales proposition (buying incentive) will emerge from the previously defined strategy, which, in turn, was derived from the goals, objectives, and consumer research efforts.

Marketing Mix - The final marketing concept involves the allocation of a priority of importance, or weight, to various marketing functions. Because resources are usually limited, it is a major strategic decision to determine how physical and financial resources should be allocated vis-a-vis improved product features, such as airconditioning, more frequent service, public information aids, promotional fares, advertising

programs, and research/evaluation activities, all of which may improve ridership.

### Marketing Program Resources

The marketing plan must also deal with the marketing budget. The marketing program budget should contain allocations of all available resources (money, time, and people). The brief discussion that follows focuses on the money resource budgeting issue. A detailed discussion concerning budget preparation is presented later in this manual.

No clear-cut formula exists for calculating a budget; that is, it cannot be stated that a small transit system should spend X percent of revenues on marketing, a medium-sized system should spend Y percent, and so forth. An appropriate marketing program budget for one system, expressed in relationship to total revenue; number of route miles; size of the population served; or other measures, may not be at all appropriate for another system.

Rules of thumb have been used to determine the size of the marketing budget. Such a rule might be that the additional expenditure for marketing, compared to last year's budget, should result in at least a proportional increase in ridership or revenue, or should increase total ridership without an accompanying increase in the subsidy level per ride.

Another approach is one in which the marketing budget is related to a goal or objective, but not necessarily to individual tasks. An illustration of this type of this approach can be found in the case of a West Coast transit system, which set a goal to persuade automobile commuters to try the system during the year. The marketing budget established to achieve this goal was equal to the cost of one free ride for each automobile commuter. Within this total, the percentages of the budget to be allocated to its components--advertising (radio, newspapers, direct mail or other home delivery, and other modes), sales promotion, and public relations--were developed.

Market data indicates that service companies, in general, and transit operators, in particular, spend too little on marketing. A study published in the October 1974 issue of Journal of Marketing reported that service firms spend only two to four percent of their total sales volume for marketing compared to ten to twenty percent by manufacturing firms. This tendency has been compounded by the past efforts of the transit industry to reduce costs through curtailment of what were formerly considered to be non-essential support functions. Additional guidelines and suggestions for handling budgeting of people, time, and money are set forth in the final section of this manual, Implementation and Evaluation.

## Marketing Action Plan

The marketing action plan itself involves the synthesis of all the foregoing. Briefly, through market research and evaluation services, information is made available concerning solutions to issues or needs. The opportunities or problems that have surfaced in this first step of the process are then employed in the framing of goals and the development of objectives and strategies. The action plan consists of the projects and activities designed to achieve the stated goals and objectives, along with evaluation and feedback procedures to measure the level of success of any given project or activity.

Rather than attempting to generalize a discussion of an action plan, the next section of this manual presents specific plan examples in twelve different areas, with a discussion of each.

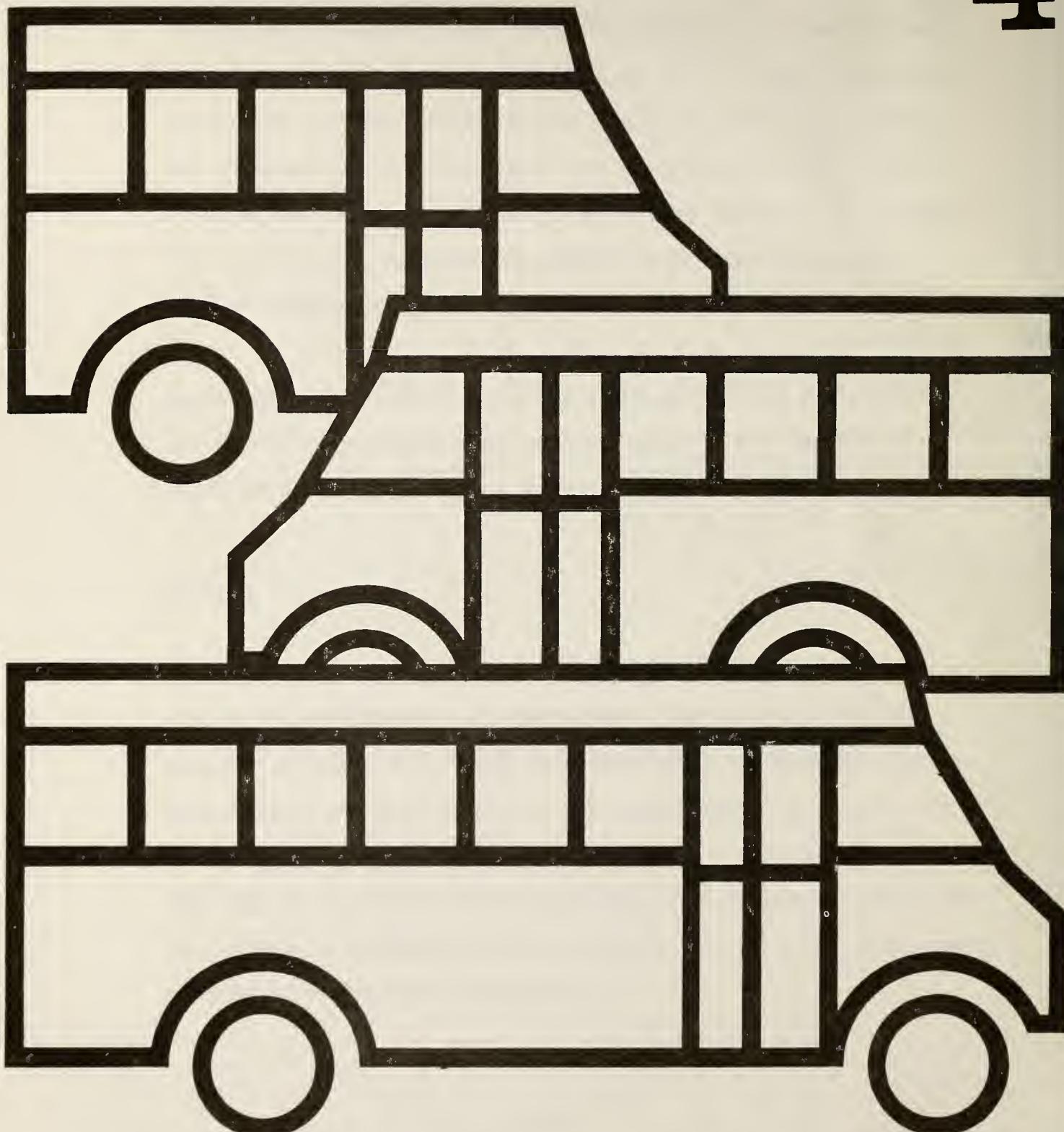
## Feedback

Figure III-1, at the beginning of this section, reflects the marketing process in a circular or cyclical fashion. The purpose of this diagrammatic approach is to insure understanding of the need for a continuous planning procedure as part of the overall marketing process. It should always be kept in mind, while organizing a marketing program, that results and updated basic system data serve as constant input into the revision or development of the marketing plan and other system plan elements as identified in Figure II-2.

Thus, monitoring and evaluation cannot be overlooked or left out; they are the key to building next year's marketing program.

# Action Plan

4



## ACTION PLAN

### Practical Project Development Suggestions and Examples\*

There are thirteen different, yet interrelated, areas for marketing involvement. Four of these are essentially external to the operation itself, including public perception (image); governmental/political leaders; business community; and media. The remaining nine are internal, or an integral part of the transit operation itself, including: public information; merchandising, promotions and special services; equipment; passenger amenities; routes/schedules/services; personnel; plant and maintenance; fares and resources; and planning.

This section provides a brief discussion of the thirteen marketing areas, then establishes goals, objectives, and projects and activities for each. The goals, objectives, projects and activities are intended to serve as examples and to stimulate your thinking; they are not intended to be the only possibilities. It is hoped, however, that these examples will provide you with enough ideas to show you how to set up a progressive marketing program. Naturally, all of the projects and activities listed here are not expected to be appropriate for your market. A few good, well-executed new projects each year, custom-designed for your needs, is all that should be expected.

---

\*This section has been adapted, in part, from the Marketing Manual for Transit Operators, February 1979, prepared for the Iowa Department of Transportation, Public Transit Division, by staff of the Department and Ilium Associates. Sources of other adapted materials are identified where used.

Note that specific measurement factors have not been built into the possible goal and objective statements suggested in this section. Percentage increases in ridership, public awareness, or similar measurements should be established by each individual organization, based on current system performance, resources available, and priorities established within the individual marketing program.

### Public Perception (Image)

The perceptions of the public can be difficult to get a handle on. This is because perceptions are made up of individuals' thoughts, and these thoughts are hard to define by the individuals themselves, let alone by transit managers. Nevertheless, the result of perception is choice, and then action, by the individual. Therefore, there is a need to try to exercise some control of the public's perception of public transportation.

The public's perception is a result of its exposure to transit activities over the years. Collectively, the types of people you have hired, their appearance, the condition and design of buildings and equipment, the type of press you receive, and other factors contribute to public perceptions. Do not be surprised if you analyze the results of your public opinion survey and find public transportation sitting pretty far back in the minds of the people. People have become used to other forms of transportation that suit their needs. This has come about, in part, because transportation today is much more than moving people from here to there. People are accustomed to, and expect, levels of comfort, convenience and accommodation of lifestyle to be satisfied by their transportation mode.

While many people perceive buses as being inefficient, undependable and unable to accommodate their life-styles, the picture is not all that

bleak. People's opinions can be changed, and rather quickly. Many systems around the country are enjoying a more positive community perception of service and increased ridership. The fact is that public transportation is not as bad as people perceive it to be. As a system makes improvements, people will change their preconceived notions.

The point to remember in making efforts to create a positive public perception is this: when you do it, do it right; or do not do it. Further, do not look at a route schedule as being less important than the bus itself, because it is not. Pay attention to the details so that each effort builds upon previous efforts and creates a firm foundation for what is to follow.

### Goal

To profile the transportation system as an aggressive, dependable, people- and consumer-oriented public transportation service.

### Objectives

- . To inform the public of the present and future environmental, economic, and social life-style impact that public transportation has, and will have, on the people in the community;

- . To stimulate acceptance, interest, and understanding of public transportation as a concept by assuming a more progressive profile in the community;
- . To begin to change the perceived importance of the automobile as the only major alternative for transportation needs; and
- . To create a visual image in keeping with the community and equal to other successful and respected businesses in the community.

#### Projects and Activities

There are numerous projects touching on public perception in other areas of this section. As a result, only two are suggested here.

Operating Policies - A formalized set of operating policies and procedures should be adopted so consistency in performance of services is realized. This does not need to be a complicated process. It simply requires written documentation of each activity (or group of activities), and an explanation of how it is to take place and who is responsible for its execution. In this way, everyone associated with the system will be aware of system policy and have a better understanding of how they, as individuals, can share in the job of creating a sound, positive public image. You will find that once these formalized procedures are adopted, life will be much easier for the general manager and better for personnel and customers.

Design and Use of a Logo - This sub-section has been adopted in its entirety from Transit Marketing for Urban Areas Under 200,000 Population, prepared for the Georgia Department of Transportation and UMTA. It is reprinted here with their permission.

To develop a positive image, a logo can be used to portray, identify, and define the transit system and strongly promote its image in advertising. It can be animated in media advertising, to provide a continuity, using the full capability of each media. A logo identifies system vehicles, equipment, shelters and facilities as well as maps, charts, schedules, and any other representational material. Its design is best handled by a qualified graphics designer, preferably one with corporate identity experience who is familiar with the practical communication requirements of a transportation system. Usually, this is part of the scope of work undertaken in a system identity program. Because it is part of the basic identity and will be used in many ways, it should be carefully considered.

Here are some basic guidelines to remember when choosing a logo:

- It should be unique, unlike anything else, insofar as you are aware. If you choose a concept similar to others which already exist, you lose your individuality. An analogous situation would be two persons with similar names--how would you distinguish one from the other?
- It should be simple, geometric, understood by all, and have strong visual impact. It should not be difficult to produce or print.

- . It should communicate effectively in all two-dimensional and three-dimensional applications. What is acceptable on stationery may be unreadable on a sign seen by a motorist or pedestrian 200 feet away. Avoid extremely decorative typefaces or scriptural forms.
- . It should reproduce well in black and white as well as color. In fact, the preliminary evaluation form should be in black and white.

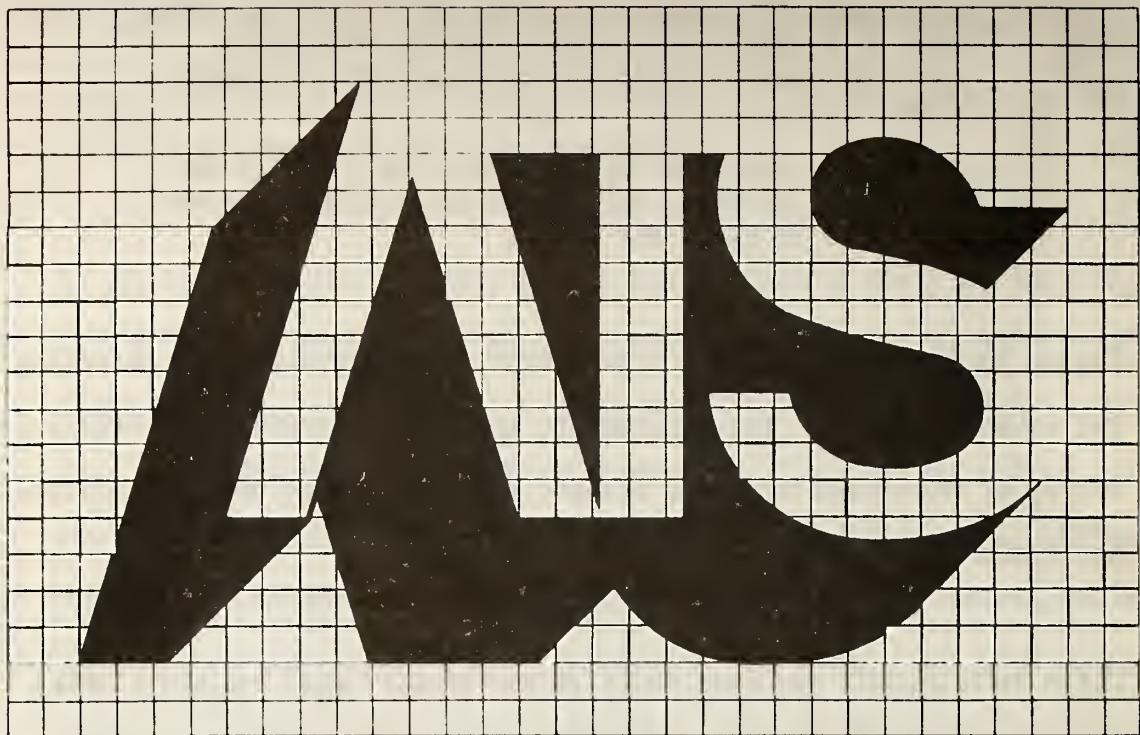
Figure IV-1 shows a standard logo format, which incorporates differing but related symbols. This systematic approach to graphics maintains a degree of individuality among transit systems through different colors and symbols.

While each transit operator needs an individual logo, and while each must be different, there are some basic design approaches previously used nationally to develop transit logos. (See Figure IV-2). They include:

- . The letter form outlined as a symbol itself. This avoids the possible duplication of any other logo.
- . A logo which incorporates arrows to symbolize the nature of the service (direction/motion).
- . Use of the bus pictogram, or variation, to symbolize the service.

As a preliminary legal step, a copyright check and filing should be made on any logo adopted.

**Standard Logo Format**



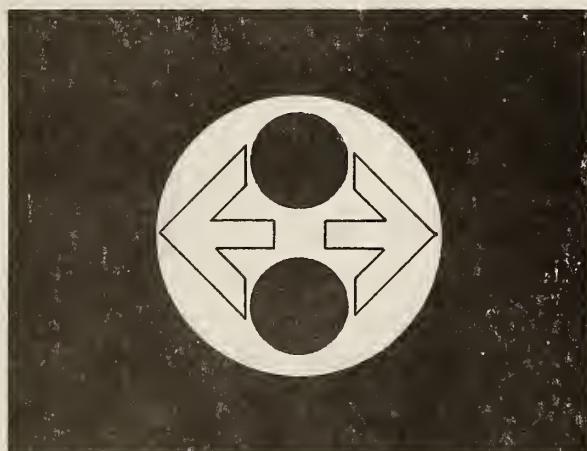
**Standard Logo Format**

Figure IV-1

**Sample Logo Designs**



**Pioneer Valley Transit Authority**



**Montgomery Area Transit System**



**Official Bus Symbol - U.S. DOT**

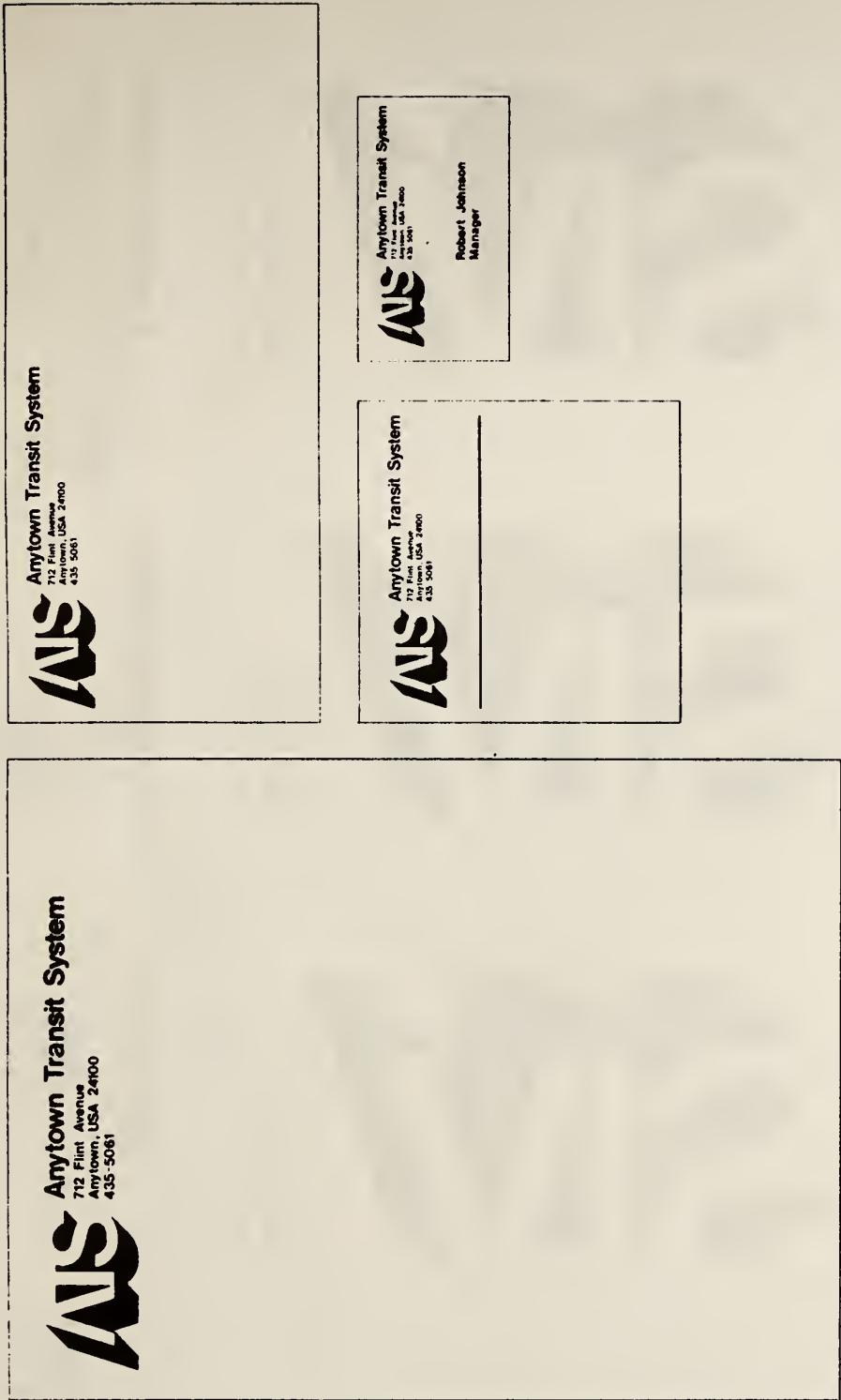
The most important aspect for success of a visual communications program is in its implementation. Standards should be set for application and use of all elements so that everyone involved has guidelines to carry out the program as it is intended. Developing graphic standards which define shape, size, proportion, color, and material for all users gives form to the marketing program and direction to the transit operator on how to continue and expand upon it.

Figures IV-3 through IV-7 constitute a representational graphics package showing the basic parts and typical uses of the visual communication system, such as:

- Authority Name
- Logo
- Symbol
- Stationery
- Business Cards and Forms
- Signage
- Schedules
- Route Maps
- Manuals
- Stations and Shelters
- Authority and Maintenance Vehicles

Consistency is extremely important since it reinforces the transit system's identity. Consistency allows the transit system to control and project the identity it wants and provides the framework within which new equipment, services, and future applications can be integrated under one common identity.

## Visual Communications Graphics



**Stationery and Letterhead**

Figure IV-3

**8** Anytown State

**10** Tift Park

**Anytown  
Transit  
Guide**

Via Main, Palmyra Park Hospital,  
University District, James Park

Effective January 1, 1977

Effective January 1, 1977



Anytown Transit System  
Information 435-5061

Anytown Transit System  
Information 435-5061

Anytown Transit System  
Information 435-5061

**Schedule**

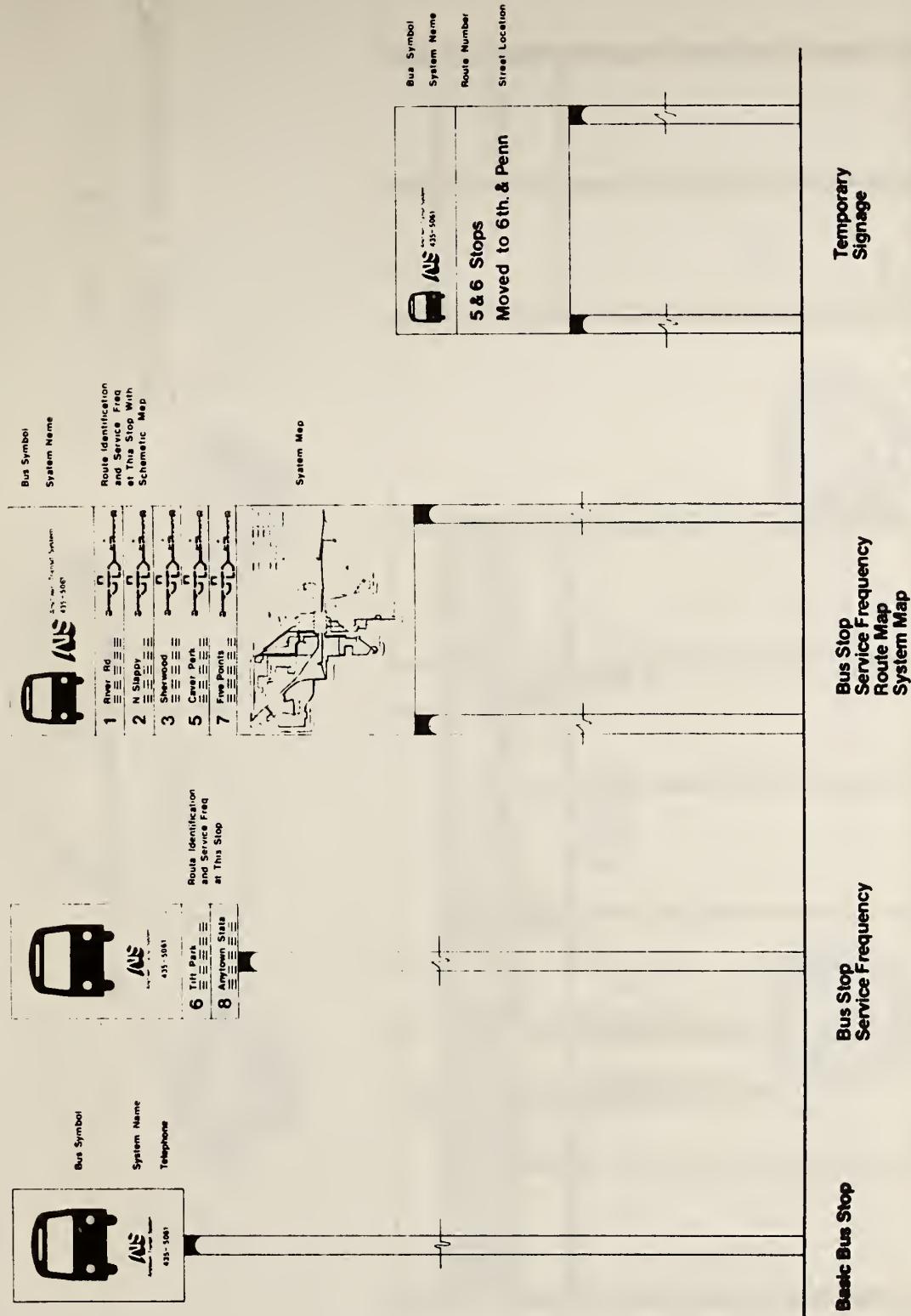
**System Map**

**Transit Guide**

Figure IV-4

Figure IV-5

## Modular Signage System



## **Shelter Identification**

Figure IV-6

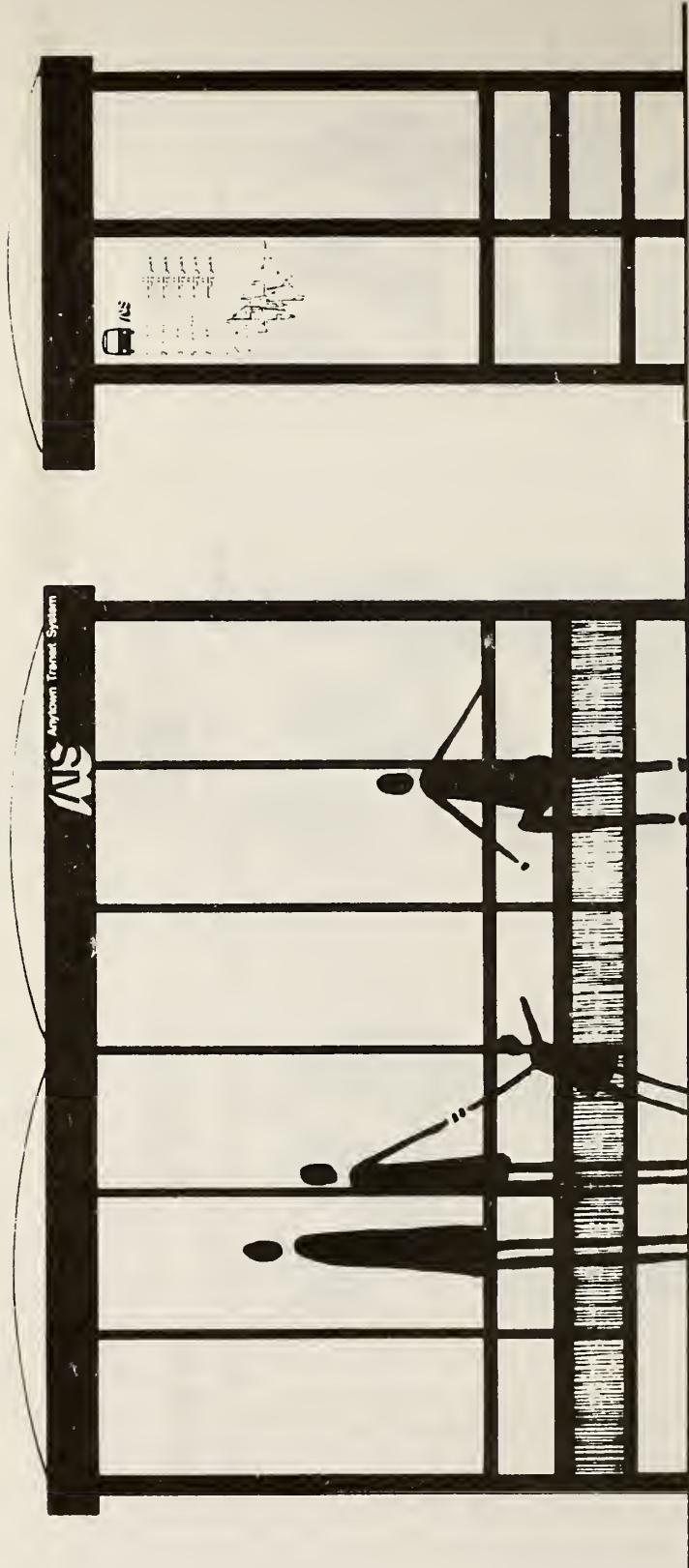
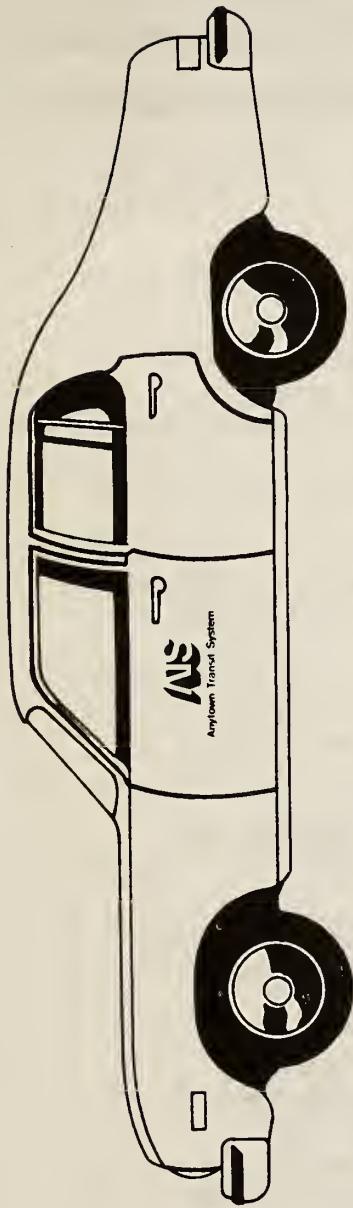
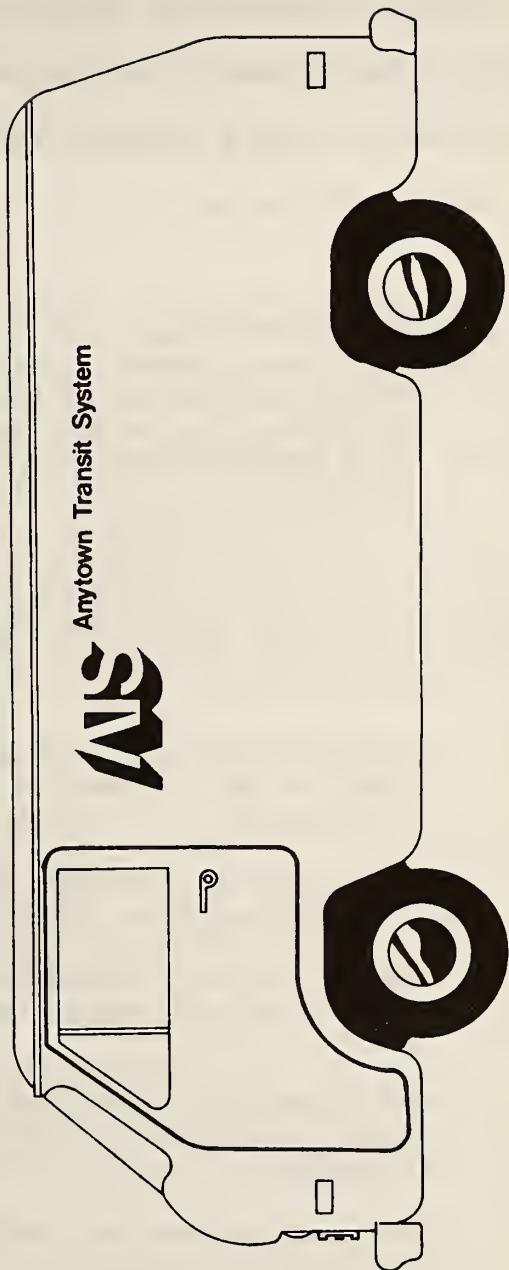


Figure IV-7

## Authority and Maintenance Vehicles



Other benefits are economic. First, the problem is resolved once and for all, and each new application is not another "project" requiring the manager's time to develop. Second, when visual communication materials are simplified and consolidated, inventory and production costs are reduced. These savings and the future savings in development costs will help cover the costs of designing the system. Design guidelines to consider in judging alternatives for the initial and subsequent program application include:

- Format (the graphic layout)
- Size (proportionally to the element)
- Position on element (centered, left, right, etc.)
- Orientation (vertical, horizontal, angled)
- Typography (same weight, upper and lower case)
- Color and background (positive, negative, value contrast)

To make sure that the system identity is maintained in production:

- Specify, in detail, what you want. Do not let others or the influence of the lowest cost bid decide for you.
- Before making a decision, first look at new applications in drawing or graphic layout.
- Ask for proofs or brownlines from a printer to check accuracy and conformance before approving production.
- Make the existence of graphics standards known to anyone who will design or produce any of the applications.
- Select a typeface both legible and adaptable to the wide range of applications planned.

## Governmental/Political Leaders

The governmental/political group, for the purpose of this manual, is comprised of those people who are in public transportation-related decision-making roles at local, state, and federal levels. This group ranges from local board members and council members to state legislators, DOT officials, United States Senators and Representatives, and UMTA officials.

It is because of the efforts of these leaders that transportation enjoys its current renaissance. Their public charges related to planning, zoning, tax support and other functions have great bearing on public transportation's future. It is important that these leaders be made aware of your programs and progress so they can continue to support public transit issues. The leaders who need to be informed about your system are:

### At the local level:

Mayor and/or City Manager  
Council Members or Aldermen  
Transit Board or Committee  
City or County Department or Agency Directors whose responsibilities affect transit

### At the state level:

Governor and Lieutenant Governor  
State Department of Transportation (Public Transit Division)  
Legislators (transportation and appropriate chairpersons)

### At the federal level:

U.S. Senators and Representatives from the State  
Regional UMTA Directors  
UMTA and FHWA Officials in Washington, D.C.

It is important to remember that there are differences between elected and non-elected officials. Those who have been elected or appointed usually have administrative policy and funding responsibilities. The non-elected officials primarily control service and planning.

Get to know those officials who are accessible. Meet with them periodically. Explain the benefits of public transportation to the community, plans for the future, how the public feels, and what successes and failures have happened and why. For those who are not accessible, copies of newsletters, leaflets, and press releases with a personal letter attached will keep them oriented. Little touches, such as sending Christmas cards, help keep the relationship on a personal, more direct level. And, be sure to acknowledge positive votes on transit issues. Let them know how important their votes are.

It will also help to attend relevant meetings so that transportation's viewpoint is represented and understood. Find out what plans are being contemplated in which your organization should be involved.

### Goal

To increase governmental/political awareness and support of public transportation systems and plans at the local, state, regional, and federal levels.

## Objectives

- . To periodically present system goals, objectives, and plans before public officials;
- . To increase management involvement in political and governmental groups;
- . To expand next year's subsidies; and
- . To secure political support for expanded service.

## Projects and Activities

The principal objective in dealing with governmental and political leaders is two-way communication. To establish this communication, you might consider the following projects and activities.

Sell Yourself and Your Organization - Establish specific short-range plans and establish budget needs. Use any research that has been completed as a data base for community support, and put together a visual and oral presentation showing transportation importance and public benefits from an aggressive transit development program. Strategically go about gaining support for each year's budget. Sell next year's budget all year long; do not hesitate to present new programs each year.

Maintain Surveillance - The general manager must make a point of knowing what is going on in other governmental planning offices in the area. The transportation system must influence, as necessary, zoning, access, rights-of-way, and other important considerations through political and technical means. Transportation systems must sell public transit benefits and research findings to elected officials. These officials, in turn, must encourage policy, budgets, and ordinances favoring public transportation development. A spirit of cooperation among system management and other governmental agencies must be continually promoted.

Let Them Know What You Are Doing - Establish a mailing list of governmental/political individuals and departments. Mail the newsletter, your annual report, and other pertinent information to relevant persons. Publish your annual successes and future commitment to the citizens of the community at a strategic time. Send information about public transportation to all declared political candidates, encouraging their support. Through the newsletter and other methods, recognize employees' involvement in social services and other community events.

Participate - The general manager, staff, and employees should take an active role in community events--socials, picnics, political rallies, and service organizations. In this manner, you can get to know public officials on a personal and social basis.

A simple, inexpensive newsletter is one of the proven means of communication. The sample illustrated in Figure IV-8 on the next page is produced regularly by Northern Kentucky Transit, Inc. in Florence, Kentucky. Figure IV-9 shows the cover and contents of a typical information brochure. These products, sent out regularly, keep public officials current with your activities and keep your organization and its purposes and needs in the front of their minds. Other samples of public information materials are to be found throughout this manual.

tucky through Northern Kentucky Transit. Mabel Bennett was the prime mover, trip planner, treasurer, and local coordinator for the Grant County Goldmen-aires. They started the season on May 6 with a trip to Rupp Arena, Lexington using two vehicles for thirty-six people. Next came a trip for sixteen to Herby Moore's Wax Museum and Wondering Woods in the vicinity of Mammoth Cave July 31-August 1. This was followed with thirteen going to the outdoor drama "The Little Shepherd of Kingdom Come" at Van with overnight in Whitesburg and next day tour of Breaks International State Park. These Touring Seniors concluded their season October 2 with a visit to Kentucky Horse Park, Lexington. A tip of the hat to them all! And a second tip of the hat to Mabel Bennett for her planning, management, and navigational skills in assisting the drivers!



Non-Profit Org  
U.S. POSTAGE  
PAID  
Florence Ky.  
Permit No. 21

Mr. Robert T. Gohle  
P.O. Box 11287  
Columbia, S.C. 29211

## TRANSIT LINE



Volume 1      October 1, 1979      Issue 6

**Carroll County Service** -- A new vehicle delivered to Carrollton August 3 began transporting clients to Handicapped Opportunity Program for Employment (HOPE) on August 21. These are clients of Comprehensive Care Center. Judge Robert M. Westrick welcomed the Coordinator, inspected the vehicle, posed for a News-Democrat picture, and provided the 10% funding match. Keys to the vehicle were placed with James Couch, new owner of White Top Taxi, who signed an operator's contract with Northern Kentucky Transit for Carroll County service.

**New Typist for Transit Line** -- Melanie Roulette arrived at Northern Kentucky Transit office August 6 and began the varied clerical, secretarial, receptionist duties essential to office operation. One of her monthly tasks is typing and mailing Transit Line. Melanie, a graduate of Boone County High School Class of '79, is a CETA employee with Boone County. Arriving daily with a positive attitude to work she has won esteem and friendship of building occupants.

**Birth Announcement** -- Stephen Ray Clayton is Northern Kentucky Transit's first baby. He was born September 2 at St. Luke Hospital and weighed in at eight pounds thirteen ounces. Lois Clayton the proud mother left the office of Northern Kentucky Transit on August 3 to await the arrival of Stephen Ray. She had done clerical secretarial work for approximately one year. On September 28 she and Stephen Ray came by for their first visit together. He is sturdy looking with strong features--mother says "big hands". These could

equip him for a future in transportation.

**Section 18** -- The Urban Mass Transportation Act of 1964 was amended in 1978 by Section 315 of the Surface Transportation Act (Pub. L. 95-590). This amendment added Section 18, a program offering Federal assistance for public transportation in rural and small urban areas. Kenton and Campbell Counties do not meet the "rural and small urban" definitions due to their large urban areas. Boone County is divisible by the regulations. The Florence Area is excluded; the remainder of the County is included. Carroll, Gilchrist, Grant, Owen, and Pendleton Counties meet the necessary criteria.

**Application for Section 18** -- Thomas M. Tureman, Transportation Planner, Northern Kentucky Area Development District is preparing an application for Northern Kentucky Transit to provide transportation to the rural counties cited above with funding assistance from Section 18. At a meeting to explore the resources of Section 18 held September 12 Pendleton County Judge Executive David Prindle and Joseph R. Lanzillotta, Assistant Director, Department of Community Development, Boone County studied the potentials of Section 18 with staff from NKADD and NKT. Funding assistance is available for capital equipment, administrative costs, and operating costs.

**Public Hearing** -- Two public hearings on Section 18 have been scheduled to acquaint the public with this transportation program and to invite their response. The first will be November 13, 7:00 p.m. in Grant County. Meeting site is the Bank of Williamstown. The second will be November 14, 7:00 p.m. in Carroll County. Meeting site is the Circuit Court Room. Transit Line readers are invited to attend these public hearings.

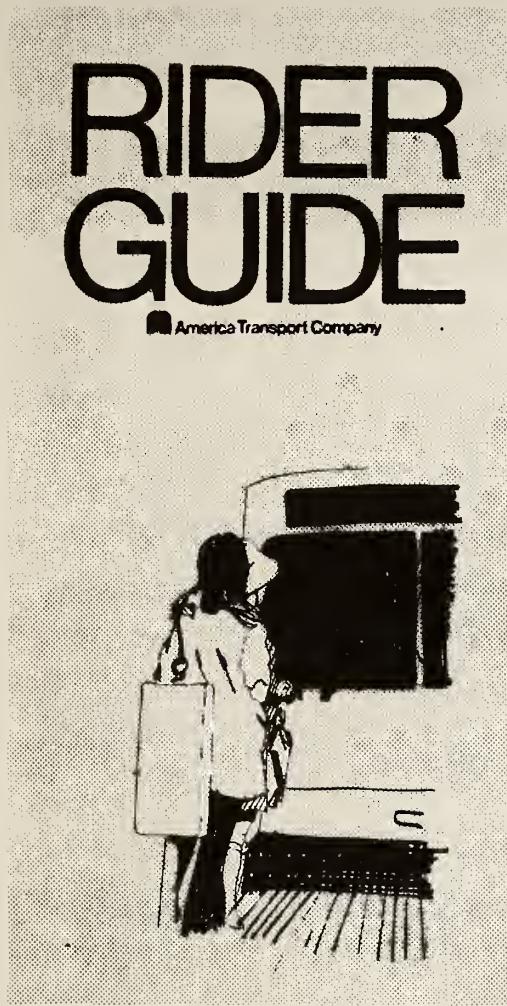
**CAC Contract** -- Northern Kentucky Transit has brokered a contract for vehicle maintenance, repair, and gasoline purchase for Northern Kentucky Community Action Commission. Through this contract CAC will achieve substantial savings on labor and limited savings on gasoline. The contract became effective October 1. Northern Kentucky Transit welcomes this opportunity to

work cooperatively with CAC.

**Ticketing** -- Tickets have been designed for the elderly and the handicapped and are available through social service agencies authorizing transportation. First tickets to be used were issued by HOPE for Comp Care Clients in Carroll County. First date of use was August 21. Arrangements for transportation tickets in Grant County have been made with Senior Citizens of Northern Kentucky and Comp Care. Buff color tickets are issued to handicapped, and light green to the elderly. Each passenger is asked to present the ticket each time he/she boards the bus, and the driver will punch the lowest number. Tickets are issued at the beginning of the month and collected at the end of the month. End of the month punched tickets are forwarded to the office of Northern Kentucky Transit for billing and auditing purposes.

**NKADD Bus Tour** -- Two Northern Kentucky Transit buses laden with VIP's toured significant area developments on September 23. Bus number one labeled "Fast Freight" went to these rural county developments: Rice Pike Bridge, Senior Citizens' Seal Site (Harrison), Riverfront Beautification (Ghent), Ghent basketball Court, Riverton Senior Citizen Apartment Complex (Carrollton), Carroll County Recreation Park, General Motors Industrial Site (Carroll County), Energy Conservation Program (Owenton), Owen County/Owenton Fire Station, and AT&T Long Lines Facility (Williamstown). Bus number two dubbed "Super Streak" went to these urban county developments: Boone-Kenton SECT, Applewood Group Home (Burlington), Ash and Elm Streets Redevelopment (Ludlow), Kenton County Senior Citizen's Center (Covington), Salvation Army Adult Day Care (Newport), Southgate Tennis Courts, Northern Kentucky Port Authority (Wilder), Foreign Trade Zone (Wilder), Dodsworth Lane Bridge, and A.J. Jolly Park. Final destination was the Pendleton County Country Club where the NKADD annual meeting was held. Drivers reported pleasant passengers, and passengers reported capable courteous drivers. The "Super Streak" crossed the unnamed I-275 Ohio River Bridge at Brent.

**Mabel Bennett and the Goldenaires** -- Grant County Senior Folk took advantage of summer weather to tour Ken-



Cover

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### Section II

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Figure IV-9  
PROMOTIONAL PAMPHLET



### Business Community

Communicating with the business community is just as important as it is with government. Businesses have a direct effect on local revenues and, therefore, systems funding as well. Businesses must understand that public transportation is a community service whose presence is necessary now and will be increasingly so in the future.

#### Goal

To involve the business community in short- and long-term public transportation implementation.

#### Objectives

- To assume a leadership role in stimulating business participation in transportation system development;
- To make the business community aware of the economic impact of public transportation;
- To assist businesses in developing and providing for public transportation access to existing and new residential and commercial facilities; and

- To secure business community participation in transportation user incentive projects.

### Projects and Activities

The most important aspect of developing relations with members of the business community is to use their time and talents well. Plan meetings carefully to get their participation and give them something concrete to do.

Establish an Ad Hoc Business Committee - Consider developing a list of people representing a cross-section of businesses. Hold an informal meeting with a representative number of business leaders and give this group the transportation system "story"--what it is doing; what its plans are; how it can help them; and how they can help it. If there is interest following the meeting, suggest that an ad hoc committee be formed. Such a committee would provide advice, open doors, and help push the politicos. Most important, it would serve as a source of good ideas and information.

Produce an Employee Information Packet - Develop a list of major employers located on bus routes. With the employers' cooperation, produce an attractive information packet for distribution. Then solicit employers' cooperation in distributing information to all employees on a scheduled basis.

Devise Joint Promotions - Special free or reduced fares supported by merchants during sale days are a great way to involve the business community in a mutually beneficial project. Special fares or free rides supported by new businesses or shopping centers might stir up interest, too.

Encourage Participation in Decisions Concerning Facilities and Operations - Encourage businesses to make suggestions regarding shelter design, maintenance, materials and location, especially when stops are in their immediate area. Collect data to determine current and potential transit ridership to shopping centers, large employment centers and other points of concentration, public and private. The economic, employee, and customer benefits of easy public transportation access to facilities should be explained to business management.

Encourage Programs for Facility Development - Assist new residential and commercial areas to construct benches, shelters, and landscaped waiting areas. Such developments can be encouraged by providing transportation services to these areas and assisting in the design and capital costs required for such facilities. Businesses want customers, but they do not want them standing in their door, waiting for a bus. Yet, public transportation can have a significant impact on the retail and employment centers of the city, especially upon downtown merchants. Business needs public transportation and transit needs the business community; a cooperative spirit between both entities is required.

required. An active role in the design concepts of any downtown urban redevelopment improvement project should be assumed by the transportation system.

Contact Businesses Along Bus Routes - Let the business community know that the system is around and concerned about its needs. Seek advice, hear complaints, gain support, and always follow up with a letter. Encourage businesses to provide rider amenities in proximity to existing and new structures. Develop a modular bus bench and bus shelter system so that businesses can purchase units, borrow plans, or allow the transportation system to build amenities on private property. Consider a mailing once a year to all business along bus routes telling them about transit plans and asking for information in return.

Figures IV-10 and IV-11 provide examples of joint transit-business promotions. Often, these promotions are a means of introducing new riders to the system. Your objective is not only to get the rider on board to try the system, but also to present a positive system image to new riders, to the extent that they will return again and again. Be sure your system is ready in every respect before taking on such a promotion.

# ASK FOR YOUR



## SHOP/RIDE



# FREE PASS HOME

Shop with the  
following uptown  
merchants during their  
Spring Festival:

Baptist Book Store  
Belk  
Burger King  
Ivey's

Lucielle's Vogue  
Merle Norman  
Purcell's  
Reliable Loan

They'll send you home  
on the bus.



**CT Charlotte Transit System**  
For information call 374-3366

## PENTRAN'S HOLIDAY SHOPPERS EXPRESS

HOP ABOARD THIS PROMOTION . . .  
YOUR SHOPPERS DESERVE IT!

Call Al Richards at



722-2837

and say "Yes, we will hop aboard the  
PENTRAN HOLIDAY SHOPPER EXPRESS

# PENTRAN'S HOLIDAY SHOPPERS EXPRESS

## COMING YOUR WAY!

## PENTRAN'S HOLIDAY SHOPPERS EXPRESS

### GEARED FOR TODAY

Think about this. With the cost of driving a car sky-rocketing and with the cost of gasoline going into orbit, you had better start thinking about your shoppers. Their transportation means will have an effect on you. For shoppers and errand-runners, riding the bus is fast becoming "the way to go." But how can you be sure that the way your shoppers go will be to your mall or center? One way to get them going is to participate in Pentran's Holiday Shoppers Express.

### PROMOTION FOR BOTH OF US

The beauty of Pentran's Holiday Shoppers Express is that it is geared to benefit both your center or mall and Pentran. We benefit by increased ridership; you benefit by increased shopper traffic in your center or mall. This promotion will bring shoppers to you by the busloads.

### LEAVE THE DETAILS TO PENTRAN

Basically, Pentran's Holiday Shoppers Express is a promotion in which certain buses are marked as participating shopper buses. Riders who qualify receive a free gift from Pentran for riding the bus, and because all participating buses are destined for participating shopping centers and malls, riders also receive free gifts, when they qualify, from centers and malls. When boarding a participating Pentran bus bound for your mall or center, riders are given a card which, when punched a determined amount of times, qualifies them for your gift.

And because each participating center or mall will ideally offer different gifts, shoppers are encouraged to ride the bus to shop where they ordinarily would not go. Advertising in newspapers and radio will point out routes of participating buses, also, participating buses will be easily recognized by appropriate decoration or marking. We will also work with you on selecting your gift, to avoid duplication. So leave the driving and the details to us.

### MATCHING FUND ADVERTISING

Can you afford not to participate in matching fund advertising program for your center or mall? Dollar for dollar, Pentran will match your financial investment in this promotion. Like every investment, the more you put into it, the more you get out of it. It only stands to reason that if your particular shopper gift is more desirable than your competitors' shoppers will ride first to your mall or center. The real success of this promotion, however, depends on the number of riders we have participating. With matching fund advertising dollars and with more centers and malls participating, we can completely saturate the Peninsula market with advertising in newspapers, radio, possibly even television. We want you - we want all of you - to participate in this Peninsula-wide promotion. The success will benefit both of us.

### THIS PROMOTION IS FLEXIBLE

Pentran's Holiday Shoppers Express can be geared to any high density shopping day - the Christmas season, Veterans Day, Washington's Birthday, you name it. We envision that when this promotion catches on with your shoppers, we will have to put on extra buses to accommodate them. More riders for us . . . more shoppers for you. That's what this promotion is all about.

Figure IV-11

## Media

Apart from cooperation in advertising and promotional programs, the media can also be very influential in swaying public opinion, and public opinion, in turn, can sway legislators's votes. It is important that the media understand what the transportation system is trying to achieve and be kept informed of its activities so that objective, knowledgeable reporting can take place. Not all press coverage will be complimentary, but if rapport with the press is good, then at least the uncomplimentary coverage can be constructive.

Most contact will take place with newspaper, radio, and TV reporters. Radio and TV are the media of the moment, and coordinating emergency information with them helps build a good working relationship. For example, suppose a rain storm causes an accident that blocks a major street and one of your drivers notifies you--call the stations and notify them. They, in turn, can warn motorists. Newspapers will carry more detailed information, such as plans for the future, employee profiles, and other in-depth reporting.

As you begin dealing more directly with the press, do not be discouraged by negative opinions. Work with the media to turn the negatives into positives. Get the media people involved--show them your facility, give them a tour on the bus routes, and give out one-day passes. Encourage them to give you objective criticisms and to write the human

side of the bus business. Approach them in a positive way--do not be defensive--be helpful and straightforward.

### Goal

To increase public awareness and support by creating a positive and cooperative attitude between public transportation and the media.

### Objectives

- . To meet with newspaper editors and radio and TV station managers at least twice a year;
- . To mail a letter twice a year to radio and television stations and any smaller area publications, encouraging them to call or stop in any time;
- . To create rapport with editorial writers of the major publications in the area by keeping them up to date from technical points of view; and
- . To stay on good terms with reporters through periodic calls, letters, and lunches at opportune times.

## Projects and Activities

As with other specific areas of the public, the critical aspect of relations with the media is good, regular communication. With this in mind, establish and maintain an accurate mailing list for all media forms. Press releases related to existing, future, and potential transit activities should be sent to the media on a scheduled basis. Something should be mailed out at least once a month. Send your newsletter and your transit system annual report to all media.

Release information related to next year's budget and plans at strategic times. Essentially, this means building up the pace of press releases, submission of potential developments, and program acknowledgements of the current year's successes and disappointments two to three months prior to final budget allocations. This effort requires that a specific communication strategy, including objectives, be designed to support the plans and budget requirements for the next year. The communication plan must be prepared to be modified, if necessary, depending on public and press reactions.

## Public Information

This marketing area incorporates user information, sales communication and merchandising strategies, and printed pieces prepared by the system. These products and strategies are important to the system because they tell the people what the system is and how to use it. Therefore, the manner in which they are prepared and presented requires careful consideration. Some possibilities for presentation of public information might include the following:

Prepared User Information Aids - These pieces are your method of communicating to the rider about the services you offer, and their production is one of the most important responsibilities of the system.

Media Coverage - Use press releases and encourage in-depth reporting.

Community Meetings - These meetings are held to discuss the city or county's future plans. These are opportune times to discuss major transportation plans or new developments.

Citizens Advisory Committee - A committee that represents the citizens of your community is an effective means to gain objective input. Its function is to serve as the eyes and ears of the system; to let you know what problems the riders are having; and help find ways to solve those problems. The committee can also lend an important hand in community votes, distributing information and encouraging general community support.

School Program - Making periodic visits to the schools can help. Bring buses to school yards to help explain bus riding "etiquette." Explain such things as where the buses go, how much a ride costs, how to read a schedule, where to wait for a bus, and how to know what bus to take. For older children, explain the benefits of the system, and ask for their support. Hand out schedules and other printed materials. Students are good sources for immediate as well as long-range customers.

Advertising and Merchandising - This is the "window dressing." The real selling piece is all the efforts that go into making up the transportation service being offered. Advertising is very effective in telling people about the system and convincing them to try it once the preparation of improving services is underway.

Paid and public service advertising is available in most communities. Most newspapers do not carry public service display advertising, but radio and television stations are very accommodating in this regard. All media carry paid advertising, however

Merchandising is made up of those efforts where you encourage use by giving something away or doing something special to attract attention. Examples would be giving away free rides, giving flowers away on Mother's Day, or having a wedding on a bus. A local advertising agency should be retained to help you in these efforts in order that a proper job can be done. A local agency can help you in many ways, provided that you have someone on your staff who can spend some time helping the agency understand your needs and objectives.

### Goal

To develop a public information program that will reinforce current riders and educate and persuade potential riders.

### Objectives

- . To define rider and non-rider groups' information needs and motivation;
- . To inventory information needs by rider and non-rider groups and by the effect these needs have on the decision to ride;

- . To design and implement a user information system (on- and off-route) and a targeted sales communication system (promotional) plan with available resources;
- . To develop a consistent and complimentary image in the community; and
- . To encourage participation with the public.

### Projects and Activities

There are numerous areas of activity under the general heading of public information. In addition, because of the vital importance of the public information program, we have provided details, including design criteria, guidelines, and examples, within the text.

Public Time Schedules - The public time schedules can be one of the most informative pieces produced by the transit system. The time schedule rates number one by consumers among the information pieces. Its function is to give the rider the following information: name and/or number of route; route details; time buses leave from route origin, destination, and key points along the route; and additional information that may be helpful.

Because a time schedule can hold only so much information, it can become too complicated and unclear. For that reason, design is extremely important. Unclear information may be more harmful than no information, for this printed piece is a representation of the system, and as such, conveys an impression to the user about the system. Any chance to create a good impression is certainly worth the extra effort in planning.

Design criteria and guidelines include the following:

Size: A 3- to 3-1/2-inch wide by 7- to 7-1/2-inch high (folded size) format is an excellent workable size. Any additional panels needed to accommodate more information are also 3- to 3-1/2 inches. It will easily fit in a shirt pocket or purse.

Cover: There should be design consistency for all schedule covers. Information included on the cover should consist of: route number; route name; effective date of schedule; system logo and name; and optional graphic design.

Route Map: Parts to include on the map are:

- Base transit route
- Important streets on which the bus travels and others that bisect
- Important landmarks
- Zone boundaries
- Transfer connections
- Directional arrow, indicating North
- Arrows indicating route direction, if necessary

If cross streets, zone areas or other such information makes the map too hard to decipher, these can be screened back. This means that they will partially fade into the background rather than being displayed as boldly as the base route itself. All words on the map should be type-set; do not use a typewriter.

The map's location should be on the inside front panel. A legend block should appear in one of the corners on the bottom of the map. It should explain any symbols or special notations used on the map.

Time Blocks: The time listings should be placed in the remaining available panels. Each horizontal line of numbers should have a ruled line dividing it from the next line. A legend block, as used on the map, should be added if there are symbols or notations used in the time listings.

Intermediate Points: Major streets between the origin and destination streets should be included as time-points in the time listing. These points help riders orient themselves and enable them to more easily figure bus arrival times for their stops.

Daily service should be listed on the inside front panels beside the map. Try to list Saturday, Sunday, and holdiay service on the back panels. (This is not possible with all schedules.) Some separation, either a wide, bold line or a space, should separate A.M. and P.M. listings.

Other Information: Additional space may be available after the mandatory pieces have been placed. This space can be put to good use explaining fare policies and procedures, holiday service, a new or special service, or just saying, "Hello, thank you for riding!" Whatever use is designated for this space, it should be simple, easy to read, and short. For example, a long, detailed explanation of fare policies can become confusing. Fares should be able to be explained easily. If they cannot be so explained, their complexity may be a riding deterrent and should be re-examined.

Typeface and Legibility: All parts of the time schedule should be typeset. This, in itself, will do wonders for legibility. The typeface used throughout the schedule (with the possible exception of the map) should be bold, clear and at least 10-point. If possible, 11- or 12-point type should be used, as it greatly increases readability for many of the elderly. An example of the kind of type that meets this criterion is Avant Garde. The smallest typesize on the map can go a bit smaller (6-point) if necessary.

Paper Stock: Paper can also have an effect on readability of a time schedule. If too thin, it becomes transparent, the reverse side shows through, and it becomes too difficult to read. Therefore, an 80-100 bound book paper is suggested.

Frequency of Change: Riders must be able to rely on time schedules. If times keep changing, the transit system must go through the costly procedure of repeated reprinting, or their schedules become inaccurate and invalid. Time changes can be viewed by the rider as both confusing, and even a sign of disorganization. For these reasons, it is well-advised to keep schedule changes minimal and restricted to certain intervals each year (not more than four). When changes are made to timetables, an obvious change in the cover also should take place. This can be accomplished by a change in cover design, color of paper stock, or a new, bold "effective date."

Accuracy: It is mandatory that the time schedule be accurate in every way, from the map to the time blocks, to any additional information. The purpose of the time schedule is to provide clear, concise, and accurate information to the rider so that costly information calls can be avoided. Inaccurate information reflects negatively on the system and its ability to perform its duties. It can even be more harmful than a lack of information. Therefore, every precaution must be taken to ensure accuracy.

Printing: Printing is far superior to mimeograph. It helps to ensure legibility. There are several alternatives to defray costs. Some city/county governments have printing equipment. Since most cities and counties are subsidizing the system, the use of these facilities to help the budget problems of the system may be looked upon favorably.

Many technical and vocational schools offer courses in printing and would be able to print the material as a class project. Depending on complexity (number of folds, kinds of screens, size and format), some of the less expensive quick print shops might be able to lend a hand at a low cost. Some of the bigger shops may wish to have the repeat business (reprints) and offer a competitive price as well. The main emphasis to preparing and producing the time schedule is, "Keep It Clean!"

Figures IV-12 through IV-17 present good and bad examples of route/schedule information. It is immediately apparent that the "bad" products are cluttered and illegible, while those labeled "good" present only the necessary information in a clear, readable fashion. Figure IV-18 is a complete brochure borrowed from CARTA in Chattanooga, Tennessee. Note the simplicity of design, the legibility of the map and schedule, and the extent of additional information about the system that is provided in this one, simple brochure.

Vehicle Signage - The roller sign is an elementary but essential device. It ranks second in importance as a user aid. Its function is to let the rider know which bus is which and where buses are going in a clear and legible manner. This can be done with numbers or words or a combination of the two. The signs should be coordinated with the time schedules.

## Examples of Good Cover Designs

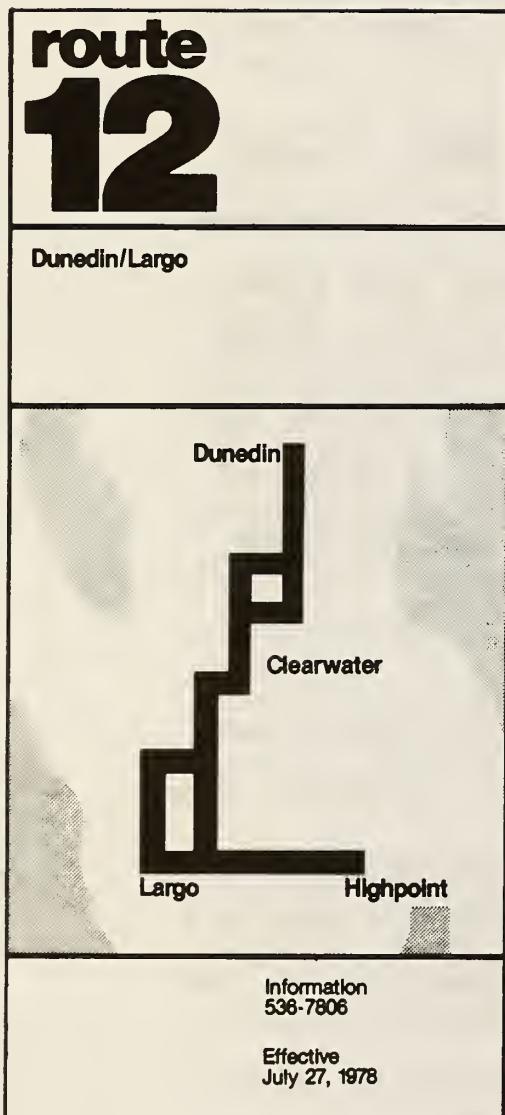


Figure IV-12

### Examples of Bad Cover Designs

**66 BELL**

FOR MORE INFORMATION  
GIVE US A CALL.  
**842-0450**

**WE'RE  
GROWING  
PLACES!**



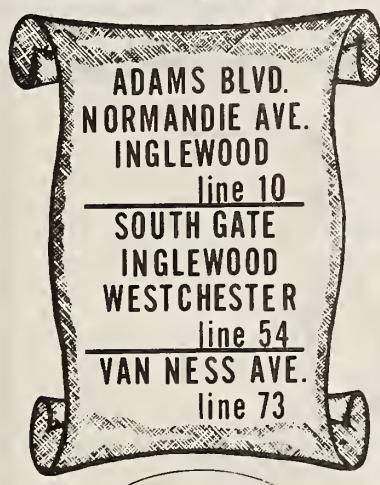
Air Conditioned  
WELCOME ABOARD

WHITE 210 MAIN BLDG. • 1212 MAIN • HC 1 UN. TE 45 77002

EFFECTIVE SEPT. 16, 1973

LINES

**10•54•73**



ADAMS BLVD.  
NORMANDIE AVE.  
INGLEWOOD  
line 10

SOUTH GATE  
INGLEWOOD  
WESTCHESTER  
line 54

VAN NESS AVE.  
line 73

NO SYMBOL  
**Transit**

Subject to Change Without Notice  
For Additional Information Call  
**call 675-4461**  
FROM CENTRAL 10

**SP<sup>irit</sup>  
Special**

Downtown  
Park-n-Ride  
Shuttle

**10¢**

Weekday Service  
Every 10 Minutes



Figure IV-13

## Examples of Good Insert Maps

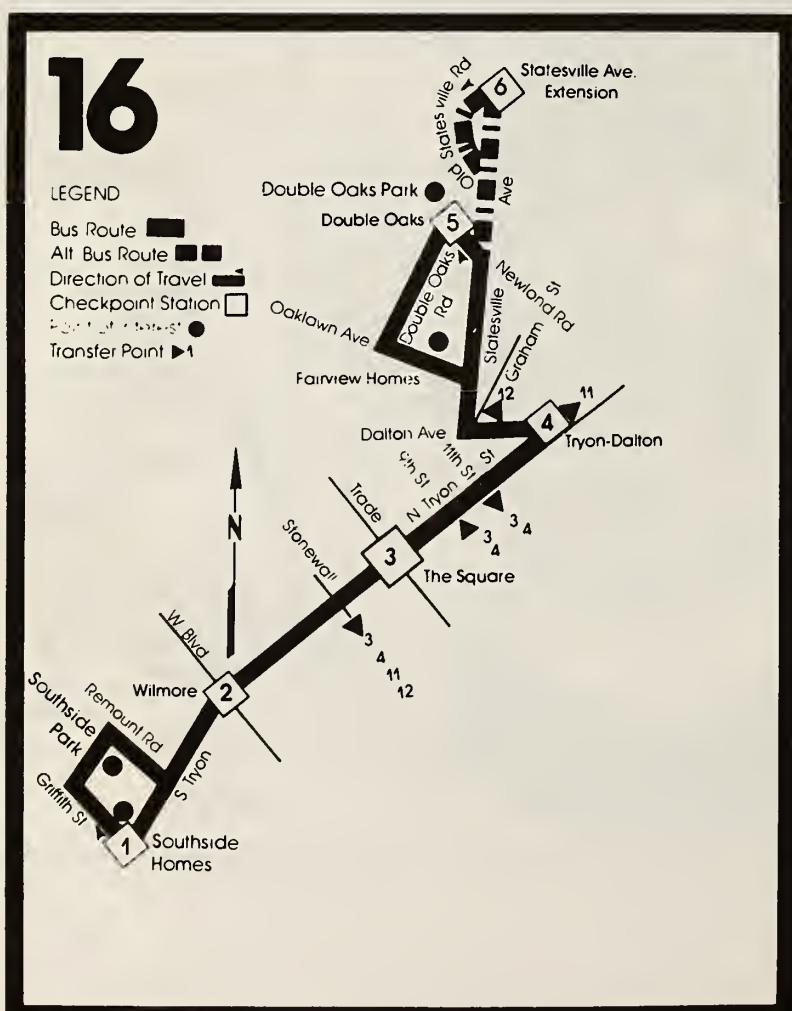
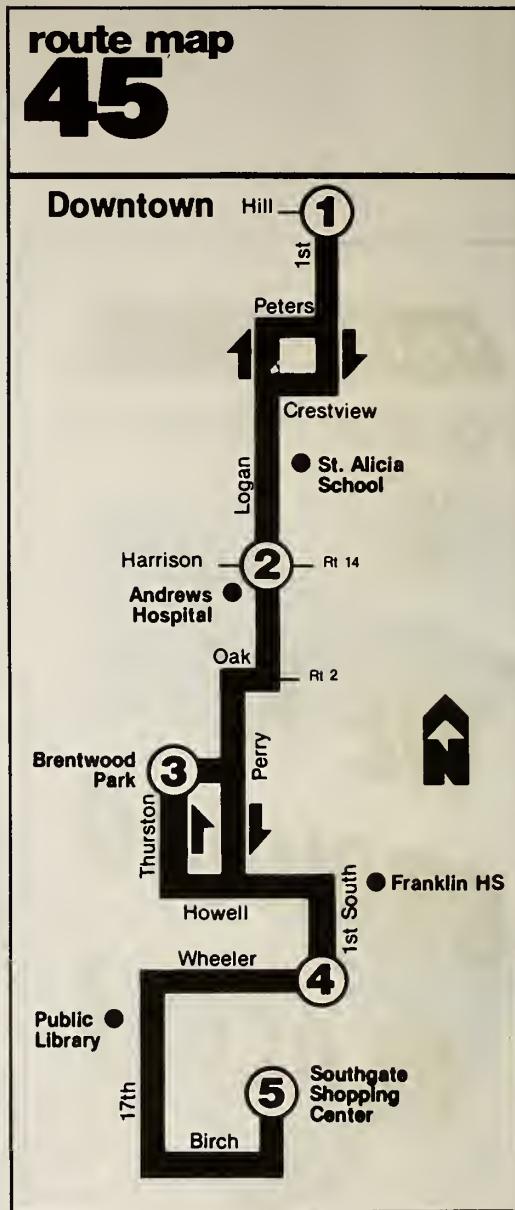
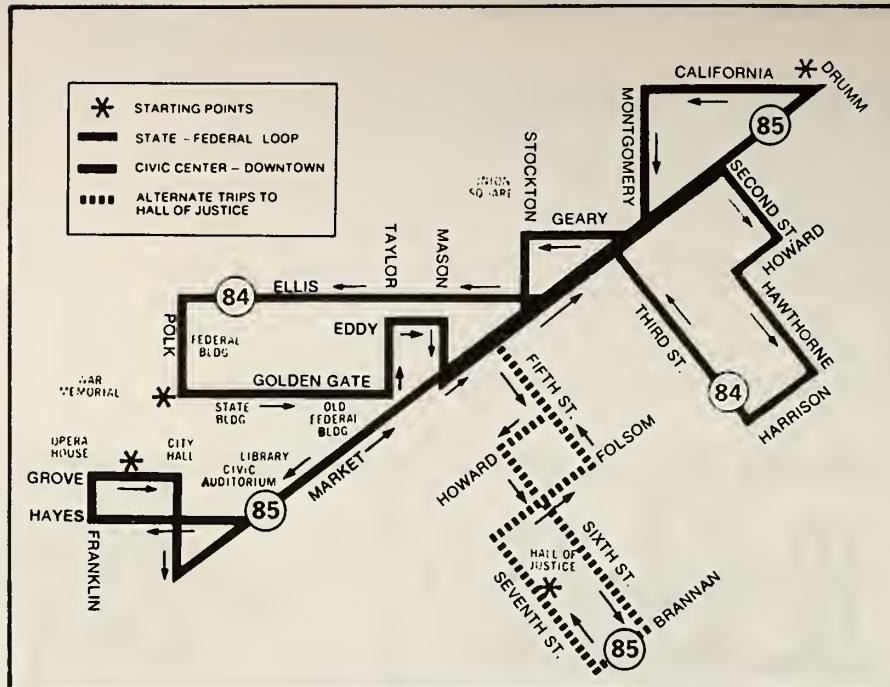


Figure IV-14

## Examples of Bad Insert Maps

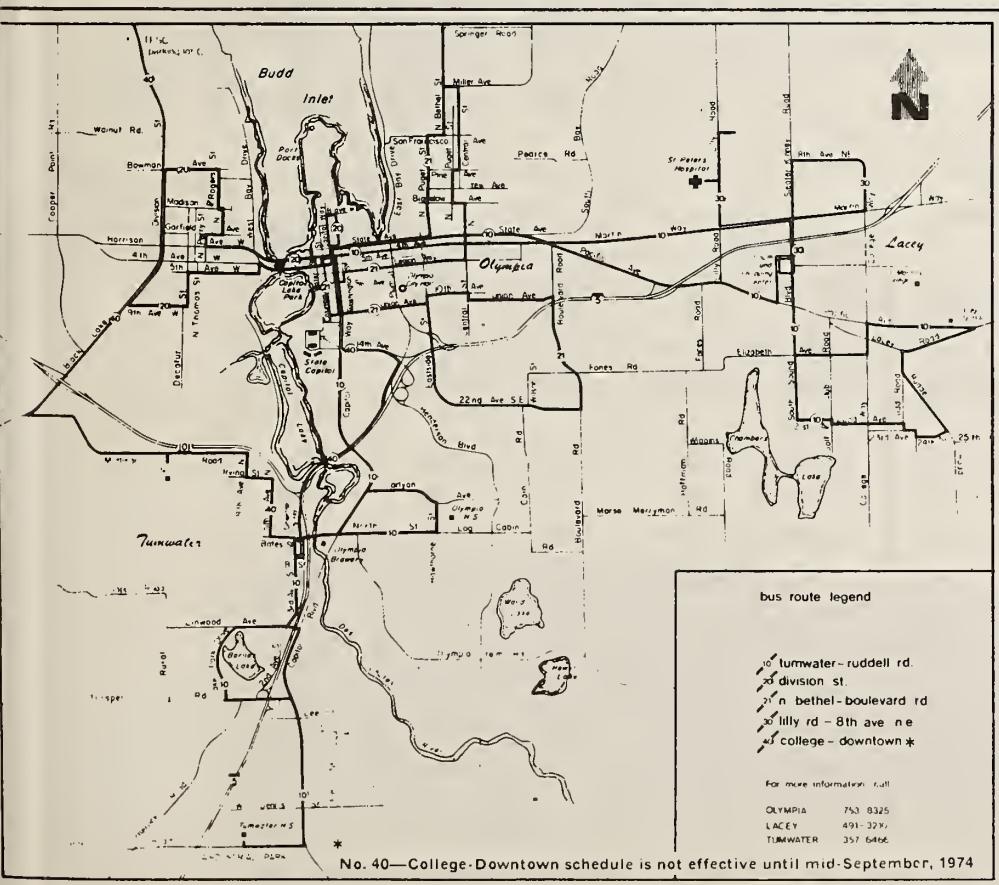
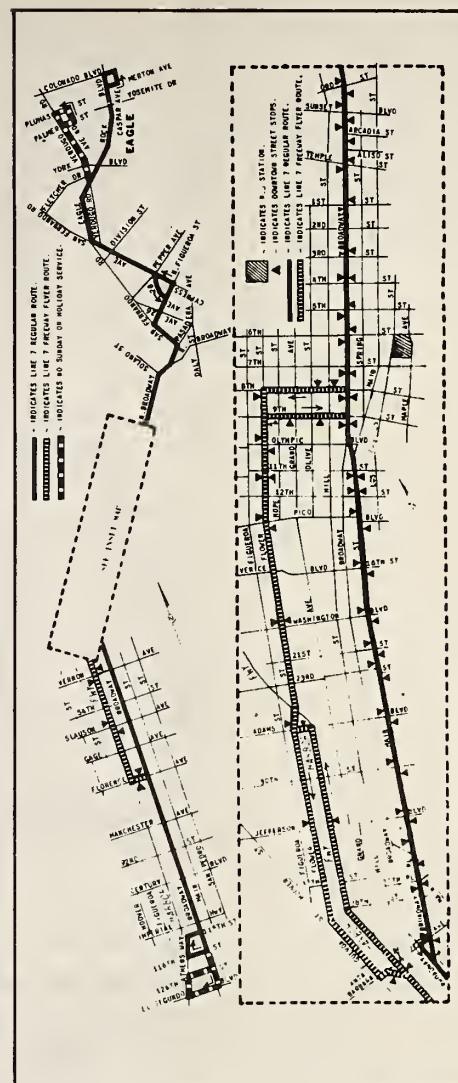
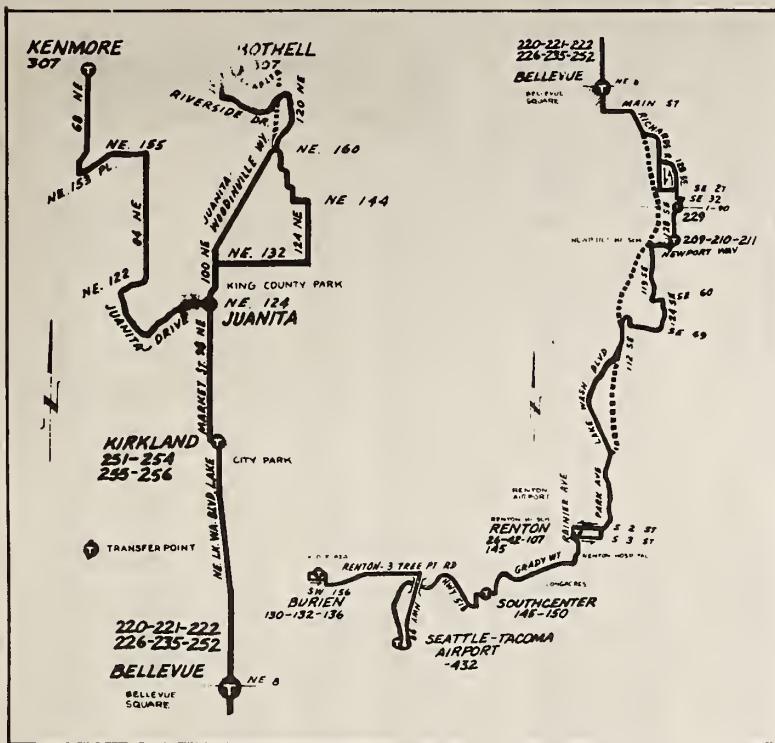


Figure IV-15

## Examples of Good Time Blocks

**SATURDAY** From Beatties Ford Rd.  
to The Square and Monroe Rd.

1	2	3	4	5	6
West	The	Presbyterian	Monroe		
Charlotte	J C. Smith	Square	Hosp	Rd	Griertown
A.M.					
—	—	5:55	6:03	—	6:15
5:45A	5:55	6:05	6:13	6:35	—
6:02A	6:15	6:25	6:33	—	6:50
6:22A	6:35	6:45	6:53	7:15	—
6:42A	6:55	7:05	7:13	—	7:30
7:02A	7:15	7:25	7:33	7:55	—
7:22A	7:35	7:45	7:53	—	8:15
7:42A	7:55	8:05	8:13	8:35	—
8:02A	8:15	8:25	8:33	—	8:50
8:22A	8:35	8:45	8:53	9:10	—
8:42A	8:50	9:00	9:08	—	9:30
9:02A	9:20	9:30	9:38	—	9:52
9:40A	9:50	10:00	10:08	10:22	—
10:07A	10:20	10:30	10:38	—	10:52
10:37A	10:50	11:00	11:08	11:22	—
11:07A	11:20	11:30	11:38	—	11:52
P.M.					
11:37A	11:50	12:00	12:08	12:22	—
12:07A	12:20	12:30	12:38	—	12:52
12:37A	12:50	1:00	1:08	1:22	—
1:07A	1:20	1:30	1:38	—	1:52
1:37A	1:50	2:00	2:08	—	2:30
—	—	2:25	2:33	2:55	—
2:12A	2:25	2:35	2:43	—	3:10
2:42A	2:55	3:05	3:13	3:35	—
3:02A	3:15	3:25	3:33	—	3:50
3:22A	3:35	3:45	3:53	4:15	—
3:42A	3:55	4:05	4:13	—	4:30
4:02A	4:15	4:25	4:33	4:55	—
4:22A	4:35	4:45	4:53	—	5:10
4:42A	4:55	5:05	5:13	5:32	—
5:02A	5:15	5:25	5:33	—	5:50
5:22A	5:35	5:45	5:53	6:15	—
5:42A	5:55	6:05	6:13	—	6:40
6:02A	6:15	6:25	6:33	6:50	—
6:22A	6:35	6:45	—	—	—
6:47A	7:00	7:15	7:21	7:30	7:35
7:17A	7:30	7:40	—	—	—
7:27A	7:40	7:50	—	—	—
7:35A	7:47	7:55	8:01	8:10	8:15
8:15A	8:27	8:35	8:41	8:50	8:55
8:55A	9:07	9:15	9:21	9:30	9:35
9:35A	9:47	9:55	10:01	10:10	10:15
10:15A	10:27	10:35	10:41	10:50	10:52
10:52A	11:04	11:10	11:16	11:25	11:28
11:28A	11:38	11:45	11:51	11:55	12:00

FARES. 40c anywhere, anytime. Please ask for a transfer when you pay your fare if you will be changing buses.

Figure IV-16

## SATURDAY

TO DOWNTOWN SEATTLE  
From Aurora Ave. N. and Green Lake

N. 145th St. and Aurora Ave. N.	N. 85th St. and Aurora Ave. N.	N. 45th St. and Stoneway N.	N. 38th St. and Aurora Ave. N.	3rd Ave. and Union St.
A.M.				
4:57-C	5:10	5:13	5:25	
5:27-C	5:40	5:43	5:55	
—	5:57-C	6:10	6:13	6:25
6:22	6:31	6:39	6:42	6:55
6:51	7:00	7:08	7:11	7:25
7:26	7:35	7:43	7:46	8:00
7:56	8:05	8:13	8:16	8:30
8:26	8:35	8:43	8:46	9:00
8:56	9:05	9:13	9:16	9:30
9:24	9:33	9:42	9:45	10:00
9:54	10:03	10:12	10:15	10:30
10:23	10:32	10:42	10:45	11:00
10:53	11:02	11:12	11:15	11:30
11:23	11:32	11:42	11:45	12:00 p.m.
11:53	12:02 p.m.	12:12 p.m.	12:15 p.m.	12:30 p.m.
P.M.				
12:23	12:32	12:42	12:45	1:00
12:53	1:02	1:12	1:15	1:30
1:23	1:32	1:42	1:45	2:00
1:53	2:02	2:12	2:15	2:30
2:23	2:32	2:42	2:45	3:00
2:53	3:02	3:12	3:15	3:30
3:23	3:32	3:42	3:45	4:00
3:53	4:02	4:12	4:15	4:30
4:23	4:32	4:42	4:45	5:00
4:53	5:02	5:12	5:15	5:30
5:24	5:33	5:42	5:45	6:00
5:55	6:04	6:12	6:15	6:30
6:23	6:31	6:39	6:42	6:55
6:38	6:46	6:54	6:57	7:10
7:08	7:16	7:24	7:27	7:40
7:38	7:46	7:54	7:57	8:10
8:08	8:16	8:24	8:27	8:40
8:38	8:46	8:54	8:57	9:10
9:08	9:16	9:24	9:27	9:40
9:38	9:46	9:54	9:57	10:10
10:08	10:16	10:24	10:27	10:40
10:38	10:46	10:54	10:57	11:10
11:08	11:16	11:24	11:27	11:40
11:38	11:46	11:54	11:57	12:10 a.m.
A.M.				
12:08	12:16	12:24	12:27	12:40
12:38	12:46	12:54	12:57	1:10
1:47	1:55	2:01	2:03	2:15

## Weekday departures

Downtown

Southgate

Downtown

1	2	4	5	4	3	2	1
1st & Hill	Logan & Harrison	1st South & Wheeler	S'gate Shopping Center	1st South & Wheeler	Brentwood Park	Logan & Harrison	1st & Hill
7:20	7:30	7:45	7:55	8:05	8:15	8:30	8:40
8:40	8:50	9:05	9:15	9:25	9:35	9:50	10:00
10:00	10:10	10:25	10:35	10:45	10:55	11:10	11:20
11:20	11:30	11:45	1:55	12:05	12:15	12:30	12:40
12:40	12:50	1:05	1:15	1:25	1:35	1:50	2:00
2:00	2:10	2:25	2:35	2:45	2:55	3:10	3:20
3:20	3:30	3:45	3:55	4:05	4:15	4:30	4:40
4:40	4:50	5:05	5:15	5:25	5:35	5:50	6:00
6:00	6:10	6:25	6:35	6:45	6:55	7:10G	



## FARE INFORMATION

Regular Cash fare: 50¢. Transfers: 5¢. Senior citizens and the handicapped are entitled to a special discount rate of only 25¢ fare and free transfers. Tokens for students (under 18) are also available for 25¢. In addition to the regular fare, there is a 10¢ extra zone charge north of Big Ridge Road, (Lakesite) and Lower Mill Road (Middle Valley).

## CARTA ROUTES

- Alton Park
- North Chattanooga
- Dallas Heights
- Brainerd
- East Ridge
- Tyner - Silverdale
- Collegegate
- Eastdale
- East Lake
- East Chattanooga
- North Brainerd
- Red Bank
- Rossville - Foust
- Signal Mountain
- St. Elmo
- Northgate
- Middle Valley
- Lakesite
- Soddy-Daisy
- East Ninth Street
- Carter Street
- Golden Gateway
- Amnicola Hwy. - Murray Hills
- Spring Valley - Mountain Creek Rd.
- Missionary Ridge
- Lookout Mountain

## PARK n' RIDE

A convenient way to commute to town and park for free. Simply park your car in one of 26 designated parking areas distributed around the Chattanooga area, then ride a comfortable CARTA commuter to the downtown area CARTA cares!

## DISCOUNT TICKETS

Discount books are available at all local banks, UTC, and the CARTA office — 10 tickets for \$3.50. That's only 35¢ per ride! CARTA saves!

## INCLINE

Ride America's Most Amazing Mile. Incline cars make three to four trips per hour daily throughout the year. Ample free parking is available at the lower station. A beautiful way to commute to Lookout Mountain.

## CHARTER

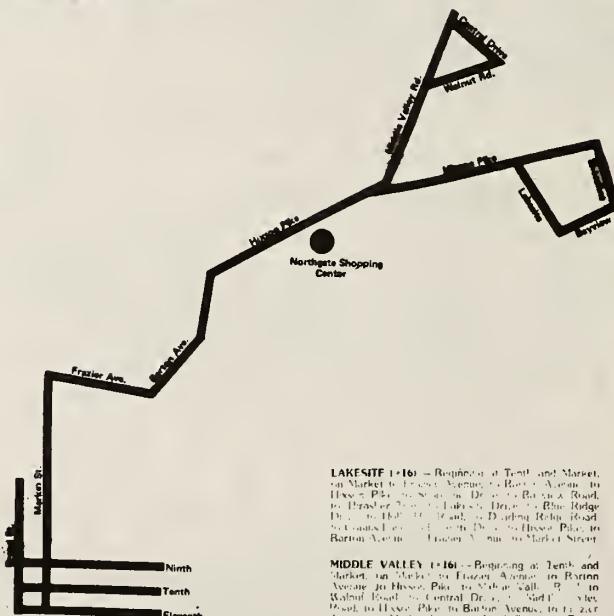
Ride America's Most Amazing Mile. Incline cars make three to four trips per hour daily throughout the year. Ample free parking is available at the lower station. A beautiful way to commute to Lookout Mountain.

# NORTHGATE



CHATTANOOGA AREA REGIONAL TRANSPORTATION AUTHORITY  
FARE: 50¢ — exact change only. Driver carries no money.

## NORTHGATE



**LAKESITE 1+161** - Beginning at Tenth and Market, on Market to Frazier Avenue, or byway to Lakeside Park, via Middle Valley Road to Frazier Street; or Lakeside Drive to Blue Ridge Drive to Middle Valley, or Dardanelle Road to Lakeside Drive, or via Lakeside Drive to Frazier Avenue, or via Market Street to Frazier Avenue, or via Market Street.

**MIDDLE VALLEY 1+161** - Beginning at Tenth and Market, on Market to Frazier Avenue, or byway to Lakeside Park, via Middle Valley Road to Frazier Street, or via Market Street to Ninth Street to Barton Avenue, or via Frazier Street to Market Street, or via Market Street, or via Frazier Street to the beginning of the route.

**NORTHGATE 1+161** - Beginning at Tenth and Market, or Market to Frazier in Barton Avenue, or via Frazier Park to the North Mall entrance of Northgate Shopping Center. Inbound route will be via Frazier Park to Barton Avenue to Frazier, to Market Street.

MONDAY-FRIDAY				
Leave 10th & Market	Leave Middle Valley	Leave Lakeside	Leave Valley Brook	Leave Northgate
555	100		650	705
645	130			620 105
A720	200			645 B130
735	230	700		705 210
750	305			710 240
805	320			715X 310
830	335			715 B335
855	350			725 355
930	405			730 410
A1000	420			750 425
1030	435			805 440
1100	440			820 455
1130	445			835 510
1200	M450	535		905 545
1230	455			935 615
	L505			1005
	M505	550		1035
	515			1105
	535			1135
				1205
				1235

SATURDAY				
650				725
750				825
850				925
950				1025
1050				1125
1150				1225
1250				125
150				225
250				325
350				425
445				515
545				615

NOTE A Indicates outbound trips to Northgate via Lupton City

NOTE B Indicates inbound trips from Northgate via Lupton City

NOTE L Indicates trip to Lakeside

NOTE M Indicates trip to Middle Valley

NOTE X Indicates trip will be express between Northgate and Downtown

\*Effective May 1, 1979

Figure IV-18

Vehicle interior or exterior space can also be used as an information aid. For example, signs containing such information as the system telephone number, or the fact that schedules have been changed and new ones issued, can be displayed. This can be a most economical method of advertising for the system.

Design criteria and guidelines for roller signs are generally accepted as follows:

Size: Sizes are standard among the various coach manufacturers. Because of the small size, this space must be used as effectively as possible. Do not try to put too much information in this space. Make certain that what is there reads fast.

Color: Many different colored screens are available. The important factor to consider is contrast. The most commonly used are black background with white letters. Other color combinations work well as long as the background is dark and the lettering is lighter colored.

Typeface: Plain, crisp and simple letters are easiest to read. In all cases, upper and lower case letters should be used. All upper case letters are harder to read because of their inability to create a shape or form that is easily recognized. An Avant Garde or Helvetica typeface should be used. A medium to bold weight is recommended.

Information Level: A route number and/or name are necessities. They should be included in both the front and side roller signs. These names and numbers must be identical to those on the time schedule and any other aids. Many systems have installed a rear box to display the route number. This is a convenience to the rider who wants to know whether a bus he is approaching from behind is his. Other information, such as "via 2nd Avenue" or "express," can be displayed as part of the front roller sign or on the dashboard. Readability should be the deciding factor. If including this on the front roller sign makes that information too difficult to distinguish, then dash signs should be used.

Transportation systems advertising (self promotion) signage involves an entirely different set of criteria:

Information Level: The signs should be helpful, not confusing. If you try to provide too much information, the sign becomes busy or unclear. The message should be simple. Leave some background space. That means do not fill up the sign with a lot of words. It looks complicated, even if it is not! If you have to provide more information, put together a leaflet to go along with the sign in a "take-one" box.

Legibility: Remember that your outside sign will be read from a distance. That distance can be anywhere from a block away to three to four feet away. The larger and plainer the type, the easier to

distinguish. Again, contrast will be a consideration--a dark background requires lighter colored lettering. Be sure to have your copy typeset.

Maintenance: Usually an advertising contractor has this responsibility. It is important to your system's image that he does, indeed, keep the signs and frames well-maintained, for it is the system the public will hold responsible.

Style and Production: If you are going to do it, do it right. Spend the time and money to design and produce a quality product. This is the one medium you can afford to use daily and it should reflect positively on a continuing basis.

Figure IV-19 provides examples of good and bad roller signs. The considerations involved are similar in vehicle advertising, route maps, and schedules. First, include the necessary information (but no more), and be sure it is legible and highly visible through contrasting colors and letter size. In the bad samples, the route number is missing in the first and the contrast is not sufficient in the second.

Telephones - Telephone information is one of the most used aids in the system. It is also very costly in terms of staff time. Telephone information ranks third in importance. If there is only one secretary whose duties include telephone information, much of her time is taken up by these duties.

**Examples of Good Roller Signs**

**25 Walnut Hills VIA  
3rd**

**25 Walnut Hills**

**Examples of Bad Roller Signs**

**WALNUT HILLS**

**25 WALNUT HILLS**

The telephone can also be frustrating for the caller, especially if there are only one or two phone lines and/or one person to answer calls. This situation results in lost calls, long waiting periods and prolonged difficulty in getting through to the system. Once again, this type of problem can discourage riding.

It helps to encourage time schedule use. Still, your telephones will be heavily used. At some point, it may be cost-effective to hire a part-time person to answer phones during extremely heavy calling periods. For the larger system, a future improvement may be the installation of an automatic call distributor (ACD). In all cases, however, it is imperative that calls be answered politely, and information given accurately and expediently.

This subject is slightly different from other user information aids in that it involves people directly. Giving out information is not an easy job, especially when it is only one of many other duties. The basic criteria for effective public contact are: speed, knowledge, understanding, patience, and courtesy.

Training for the responsibilities of this job can come from the telephone company, since it delivers seminars on this subject, or it can be on-the-job. If it is the latter, there are certain tips the operator should bear in mind:

- Speak clearly and slowly so that the caller can absorb what is being said.
- Remain calm even though the person on the other end may be upset--try to remember that the caller is usually not upset with the operator.
- Give out the information accurately and expediently.
- Be familiar with the routes and schedules so that you are not fumbling, hesitant, or inaccurate when delivering information. If unsure, check! It is better to ask the caller to wait than to be inaccurate.
- Be cheerful.
- Remember to say thank you.

Bus Stop Signs - The basic function of the bus stop sign is, obviously, to designate where the bus stops to pick up or drop off passengers. It can do a great deal more than that from a marketing standpoint. Used to its fullest potential, the bus stop sign ranks fourth among information aids. The bus stop sign serves as a visual identity or awareness piece for the system. It delivers an impression; therefore, its design and maintenance are important. The bus stop sign can also be used to deliver more information than the location of a stop. For example, it can include the route numbers for buses stopping there; or times when the bus stops there; or, at the very least, the telephone information number of the system.

Design criteria and guidelines for bus stop signs include:

Size: At least a 10-inch by 14-inch sign is recommended to ensure proper visibility. It should be mounted at a height of 7-1/2 feet, or whatever local code requirements specify.

Shape: This element is more discretionary; it depends on several factors, including: the amount of information to be displayed on the sign; whether conformity with city street signs is desired or necessary; and supplier capabilities. The most common shape used is the rectangle. This shape is also common among street signage shapes. The circle or square used by some transit systems provides a uniqueness in that they are not common among street signage shapes; however, they do not provide much space for information. An essential factor to remember when designing the signage system is to give it continuity, to make all public transit signs easy to distinguish. This keeps the rider from becoming confused by a variety of shapes, sizes and colors.

Color: The key to remember is to provide contrast for readability. A dark background should have light letters for maximum readability and visual impact.

Material: For best visibility and long lasting wear, sign grade aluminum .080 or comparable is recommended. Scotch-light materials (pressure sensitive back base with scotch-light inks), or silk screen printing with exterior grade color-fast inks are also recommended.

Typeface: Again, the key is to provide maximum readability; therefore, a crisp, clear typeface, such as Avant Garde, is suggested for the words "Bus Stop" and for any other information provided. Sometimes the system has a special type used for its name. It is acceptable to also use this type for the name on the sign. Other information does, however, need to have maximum readability.

Information Level: This level will differ among systems for a variety of reasons, such as cost, maintenance, scheduling changes, or staff and time limitations. It is best to deliver as much information as possible at the bus stop since this can help relieve some apprehensions a person may have about riding the bus. There are several levels:

Level 1 - This is the simplest level; it locates the stop for the rider and the name of the transit system.

Level 2 - Adds the bus route number.

Level 3 - Adds the bus route name (For most transit systems, this is as far as they can afford to go on most stops. Transfer points should, however, continue to add necessary information).

Level 4 - Adds the bus route map.

Level 5 - Adds departure times or vehicle frequency.

Bus Stop Standard: Bus stop signs, if possible, should be mounted on their own standards, rather than on telephone poles and other city sign posts. It is important that the bus stop stand out as an obvious place for people to wait in comfort for their bus. The height of standards

will vary by location in the downtown area, but should be 7 feet in residential areas. Wood posts (4 inches by 4 inches) and metal pipes and tubes are best for bus stop standards.

Maintenance: An important thing to remember is to keep signs and standards in good condition. Well-designed and maintained signs are a credit to the system; they leave a good impression in the public's mind and create confidence in the accuracy of the information being provided.

Figure IV-20 provides several good and bad examples of bus stop signs. Note the attempt to extend the public information effort through route numbers and even schedules on the signs. In some cases, transportation systems have indicated a combination of route numbers and frequency of vehicles (i.e., every half-hour) rather than complete schedules.

Map - The system map is both an informational tool and an awareness piece. It not only provides the rider with information about individual routes, but also shows the extent of the system services. Maps can look very complicated if too much detail is put on them or if the information is not properly displayed. A complicated look will make the rider feel apprehensive and even discourage usage. It is, therefore, most important that the map orient the rider, display the routes clearly, and be easy to use.

## Examples of Good Bus Stop Signs



## Examples of Bad Bus Stop Signs

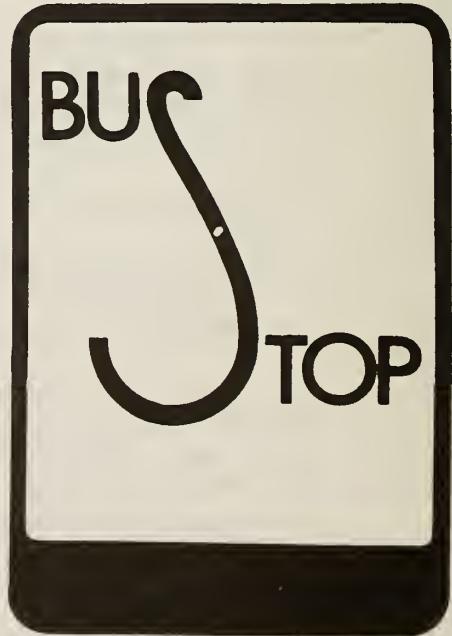


Figure IV-20

Design critieria and guidelines for system maps include:

Layout: Simplicity is, once again, the key. Do not try to show everything--this is a transit map, not a street map. But do try to show enough to give the rider adequate orientation. The important items to include are:

- . All transit routes and the streets on which they travel
- . Major intersecting streets
- . Identifying geographical points (e.g., rivers, large parks, buildings, schools, shopping centers)
- . Other secondary streets that help individuals orient themselves

Showing all these items on a map may sound too complicated. Screen back (lighten) some of the elements and use different type sizes and line weights. Make the transit routes a different color from the streets or make the route lines bolder. This will allow you to show a great deal more detail, yet still look clear.

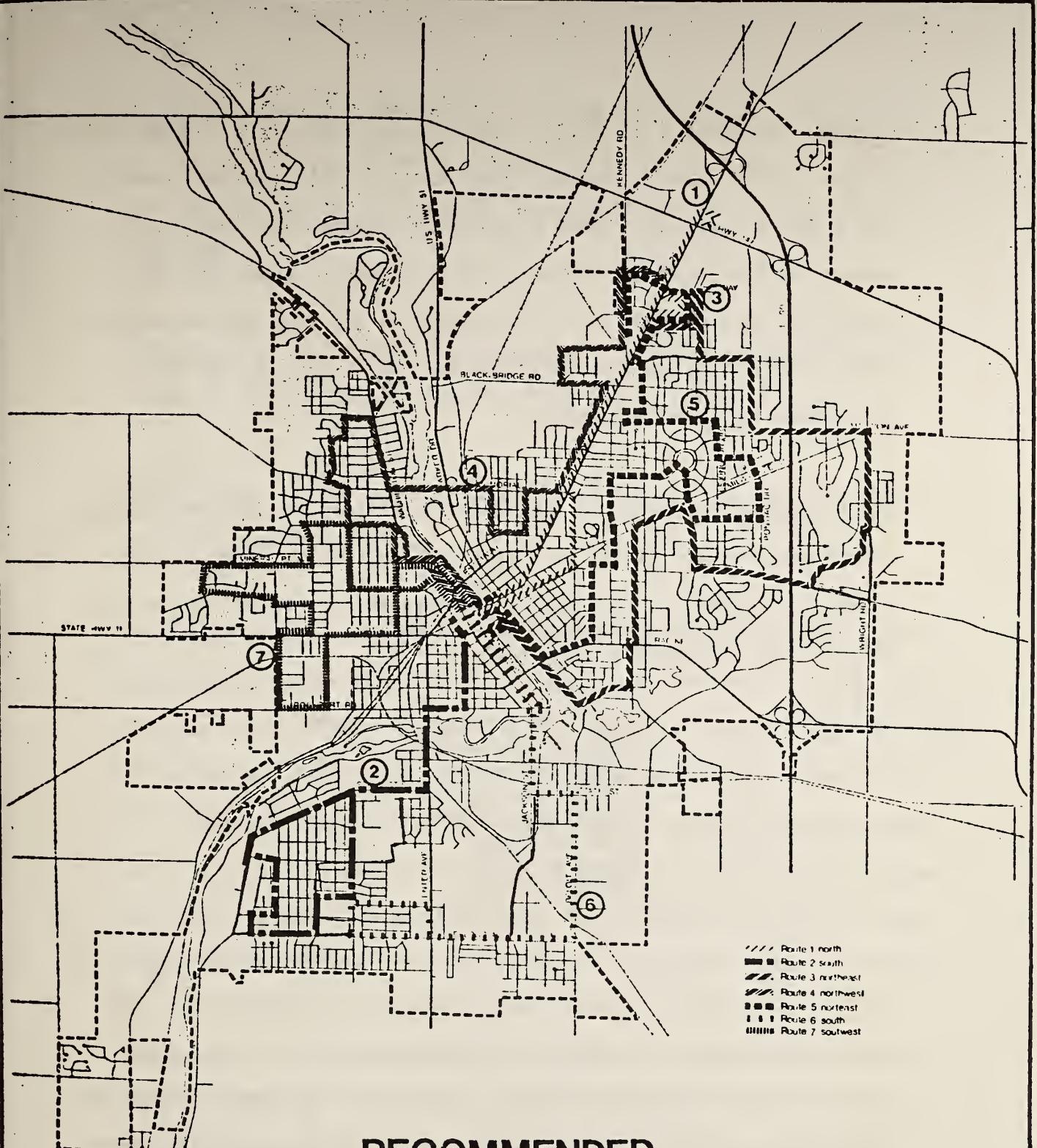
Keep the map as schematic as possible. Do not show every curve in the street, just major turns. Make it look simple--the rider does not want to think he is going to take all day to get home. Design it so that it folds to a pocket size. A 3-inch by 7-1/2-inch panel (schedule size) can be used in a map that unfolds to 15 inches by 15 inches or larger, if necessary.

Cover: Coordinate the design with other transit system printed pieces. If the time schedules have an illustration, use an illustration on the map cover. Information to include on the cover is: system name, address, and telephone number; title; effective date; graphic design; and logo.

Insert Map: Most transit systems use the downtown as the central loading area. Much shopping and business takes place here. For that reason, it is often necessary to prepare an insert or enlargement of that area for the reverse side of the map. If this is done, it should show major attractions, to help riders orient themselves. (See attached map, Figure IV-21.)

Brochures/Newsletter - Brochures range from one-page flyers to duo-fold leaflets to multi-page books. They can be used to explain how to ride the bus, or to introduce a new service, or to communicate with the public about transit news. The latter is a newsletter. It usually contains information about contemplated changes, an explanation of fares, a report about increased ridership, or recognition of a courteous driver. These types of publications create and maintain a good communication process with the public and employees. Communication builds understanding and eases apprehensions that could discourage ridership.

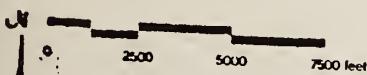
Design criteria and guidelines for brochures and newsletters include:



## RECOMMENDED REGULAR ROUTE PLAN

TRANSIT DEVELOPMENT PROGRAM

JANESVILLE, WISCONSIN



Miller Smith and Associates

Figure IV-21

Format: To maintain continuity among printed pieces, it is a good idea to use a pocket-size 3-inch by 7-inch format. This size will easily fit standard "take-one" boxes or schedule distribution racks and is easier for the rider to handle. If distributed at other outlets, it also takes up less room. It is advisable to get some outside assistance from a local advertising group or graphic designer so that a quality product can be developed.

Other Information: You may find yourself with extra space because your insert map, located on the back side, will not be as large as your overall system map. Here, again, you have an opportunity to provide some helpful information, such as:

- . Points of interest (by route)
- . Where to buy tickets
- . Operating hours
- . Information number
- . How to use the map
- . Fare structure
- . Transfer points
- . Special services
- . Thanks for riding

Colors: Two colors are practically mandatory for legibility's sake. Four-color process printing is most desirable. Some systems need colors to signify different types of services or to show different service areas. Dotted or broken lines may distinguish route differences instead of color, and screening back (lightening) detail may reduce the need for color.

Typeface: The same typeface used in the time schedules (Avant Garde--at least 8-point) should be used on the map. The type size scale (for various designations) should be worked out by order of importance to the reader.

Artwork: Use a professional cartographer or adapt, with written permission, an existing map used by other operations.

Paper Stock: Paper quality should match that of the time schedules, 80-pound to 100-pound book.

Approach: Whether preparing a newsletter or an introduction to a new service, professionalism should be uppermost in mind. If using art, make it professional. Do not sit down and do a free-hand caption--let those who are trained do it. You will look more professional and so will your operation. Write the copy simply. Do not go into unnecessary details. If you do not write this type of thing well, rely upon your volunteers or get outside help. In the long run, you will save money because people will respond better to something they understand.

Printing: Do not mimeograph these pieces. Even quickprint is superior to mimeographing. Once you have gone to the time, effort and expense to prepare these things, follow the project through with quality.

Continuity: This point was mentioned earlier with regard to keeping the printed pieces alike. It is true with brochures, too. Although subject matter may differ, the printed piece should project an identity. Each time a person sees a brochure prepared by the system, he should know that it is by the system. This can mean that all your pieces have a consistent design on the cover, or that your logo is always at the bottom of the cover. In the case of a newsletter, prepare a masthead that is used for the front of each issue.

Figures IV-22 through IV-26 are brochure/newsletter examples.

Posters - Poster or counter cards are used to display information in public areas. Many times they are used to promote awareness of service rather than details or information about service. Information display can, however, be one of their uses. Schedules of departures from a major shopping area, for example, is one such informational use. Posting information, such as which routes leave from a major location like a bank or a City Hall, is a common use. Other information, such as locations of ticket or pass sales outlets, would also be an effective use of posters.

Posters follow the same general design criteria and guidelines as other printed pieces produced by the system. Some guidelines specifically for posters include:

## What Is DAST?

The Delaware Authority for Specialized Transportation (DAST), a public authority, was established in 1974\* to provide transportation services to persons with physical or mental infirmities or in economic need as deemed eligible by responsible public or private agencies (see partial list inside). DAST operates more than 40 vehicles statewide to perform more than 15,000 trips per month for those who cannot utilize existing transportation resources.

## Where Is DAST?

DAST serves all three counties of Delaware and operates its vehicles from three locations:

Kent County — Levy Court Building, Dover  
New Castle County — Old Wilmington Armory, 10th & DuPont Streets  
Sussex County — Gravel Hill Highway Yard

## For More Information

Kent County 578-4868  
New Castle County 571-2995  
Sussex County 856-5260



### DAST Commission:

Samuel McKay, chairman  
Robert W. Lang, vice-chairman  
Mrs. Charlotte Hunt, secretary  
Steve Hackett, treasurer  
Samuel G. Thomas, Kent County  
Mrs. Bessie Bungy, New Castle County  
Gerald A. Can, New Castle County

## Specialized Transportation The Nation's First



## What Is It? Can You Use It?

## How Do I Qualify To Use DAST?

If you are served by any of the organizations listed in the center of this folder and have a physical or mental infirmity or an economic need and cannot utilize existing transportation resources, you probably qualify. Contact the organization directly to determine if you should qualify, even though you have no relationship with these organizations, contact DAST, who will try to refer you to other qualifying organizations.

## How Can An Organization Contract DAST Services?

Any organization serving persons with transportation disabilities may purchase DAST services for its clients. Contact should be made with the DAST office.

## Who Do I Call To Use DAST?

Program	Who Is Eligible?	Services Provided	How To Be Referred
A.I. du Pont Institute	any registered patient who cannot obtain transportation	to end from the Institute	Call 571-1000
American Cancer Society	anyone undergoing treatment for cancer	to end from the hospitals and clinics	Call 854-6267
Bureau for the Visually Impaired	any visually impaired person approved by the Bureau	to rehabilitation centers & medical appointments	Call 571-3320
Disability Determination	Clients of the State agency	to end from medical and therapy appointments	Call the Disability Adjudicator
Division of Social Services	Those who are approved for Title XX services and Medicaid	to end from medical and clinical appointments	Contact your Caseworker
Jewish Family Services	any member of the Brandywine Social Club	to and from the Brandywine Social Club activities	Be a member of the Brandywine Social Club
Kent County Office on Aging	residents 60 years of age & older	to and from meetings, medical appointments, delivery of homebound meals, group shopping	Call 734-7717
Multiple Sclerosis Society	anyone handicapped by MS who cannot provide their own transportation	to end from therapy, medical and clinical appointments	Call MS Office patients/ service coordinator
WHEELS/N.C.C. Senior Services	those 60 years of age and older living outside the city of Wilmington	to and from medical appointments, Senior Centers and homebound meals	Call 5/1-7739
Retirement Living/Senior Day Care Center	anyone 60 or older with a medical or mental impairment	to end from Hillside House to physical, recreational therapy meals	Ask your Doctor to refer you
Sussex County Council	1. CHEER program 2. Del Adolescent Program 3. Delaware Estate Seal 4. F.A.T.S. 4. R.S.V.P. homebound meal delivery 5. Delware blood exchange program 6. other handicapped county residents		Call participating Senior Centers and agencies or 856-5260

## Who Pays For DAST?

Those agencies who contract for DAST services pay for the transportation their clients use. The State of Delaware provides DAST with supplemental funds (only 20% of DAST's total costs) to insure that transportation is provided at the lowest possible cost.

## How Much?

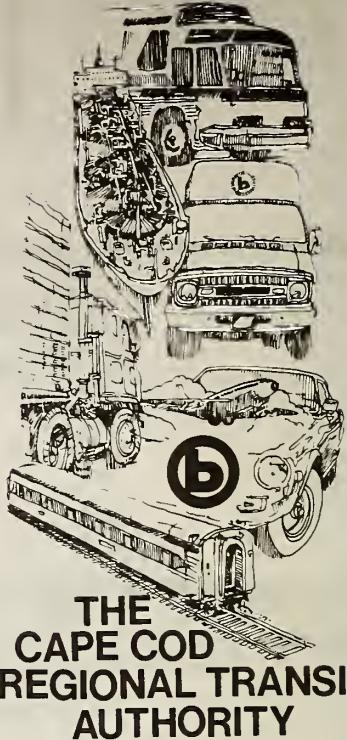
Currently, it costs DAST \$8.00 per hour to operate each vehicle. State supplemental funds allow DAST to charge contracting agencies only \$6.40 per hour. This charge, when converted to a cost-per-mile, averages only 63¢ per mile.

\* Chapter 306, Volume 59 — Laws of Delaware, (as amended).

Figure IV-22

## Public Transportation Services Available on Cape Cod

Service Area	Description	Operator	Phone	Service Area	Description	Operator	Phone
<b>BUS</b>							
Cape-Wide	Dial-a-ride 8:00 AM to 4:00 PM weekdays. Free medical service for elderly and handicapped. All vehicles wheelchair accessible.	b Mini Bus/Garfield and Sargent Transit Inc. Sponsored by Cape Cod Regional Transit Authority.	1-800-352-7155 385-6326 385-8800	Hyannis to Martha's Vineyard and Nantucket	Service from late April to early November.	Hy Line	775-7185
Provincetown	Fixed-route loop service during summer months	Lower Cape Bus and Tax. Sponsored by Cape Cod Regional Transit Authority.	487-3424 (49-92)	Provincetown to Boston	Service from late May to mid September.	Bay State-Spry, and Provincetown Steamship	487-1741 723-7800
Town of Barnstable	Fixed-route transit service covering Hyannis and outlying villages. Planned for Spring of 1980.	Contact the CCRTA for further information.	362-4571	Woods Hole to Martha's Vineyard	Year-round service.	Woods Hole, Martha's Vineyard and Nantucket Steamship Authority.	1-800-352-7104 540-2022 771-4000
Provincetown to Hyannis via Routes 6 and 6A	Fixed-route motor coach service.	Cape Cod Bus Lines.	775-5524 548-0333	Hyannis and Woods Hole to Nantucket	Year-round service provided through Woods Hole or Hyannis (varies our year).	Woods Hole, Martha's Vineyard and Nantucket Steamship Authority.	1-800-352-7104 540-2022 771-4000
Chatham to Hyannis via Route 28	Fixed-route motor coach service	Plymouth & Brockton Street Railway	775-5524				
Falmouth to Hyannis via Route 28 and Local roads	Fixed-route motor coach service during summer months	Cape Cod Bus Lines.	548-0333 775-5524				
Hyannis to Boston	Fixed-route motor coach service.	Plymouth & Brockton Street Railway.	775-5524	Hyannis to Boston	Scheduled air service.	Air Hyannis	1-800-352-3182 775-5543
Hyannis to Providence	Fixed-route motor coach service.	Bonanza Bus Lines.	775-5524 548-7588	Hyannis to the Islands, Boston, Providence and New York and other New England cities	Scheduled air service.	Air New England.	1-800-732-3450
Falmouth to Boston	Fixed-route motor coach service.	Bonanza Bus Lines.	548-7588 759-3181	Hyannis to the Islands	Scheduled air service.	Gulf Air.	771-1247
Falmouth to Providence	Fixed-route motor coach service	Bonanza Bus Lines.	548-7588 759-3181	Provincetown and Hyannis to Boston	Scheduled air service.	Provincetown-Boston Airline.	487-0240 771-1444
<b>RAIL</b>							
Hyannis and Falmouth to New York via Providence	Service during summer months planned for 1982	Contact the Cape Cod Regional Transit Authority for information.	362-4571	Hyannis to Nantucket	Scheduled air service.	Wells Air.	771-1470



**THE CAPE COD REGIONAL TRANSIT AUTHORITY**



### THE CAPE COD REGIONAL TRANSIT AUTHORITY

The CCRTA is your Regional Transit Authority. It is a regional public corporation formed in 1978 by the towns of Cape Cod under Chapter 161B of the Massachusetts General Laws. The CCRTA has responsibility for the co-ordination and the regulation of public transportation services provided within the 15 member towns.

Your Transit Authority is the catalyst for the creation of an efficient system of public transportation services to meet your transportation needs.

In cooperation with the Cape Cod Planning and Economic Development Commission and the Cape Cod Joint Transportation Committee, the Authority makes short and long range plans for the modification of existing programs and the creation of new programs. Federal and local funds are used for public transportation on Cape Cod. The Authority employs these funds to insure that all services are well co-ordinated with each other. The Authority has the power to regulate routes, schedules and fares for all new fixed-route public transportation services provided on Cape Cod and has mechanisms available through which local towns can contribute to the costs of providing service within their boundaries. In addition, the CCRTA has the ability to create and administer its own

public transportation programs. Programs initiated by the Authority have included the b mini-bus service, the Town of Barnstable fixed-route service.

The Cape Cod Regional Transit Authority is a "body politic and corporate and a political subdivision of the Commonwealth," as defined by Massachusetts General Laws Chapter 161B, Section 2. Its membership is composed of the 15 towns on Cape Cod, each of which is represented on the CCRTA Advisory Board by the Chairman of each town's Board of Selectmen or his designee.

It is empowered to establish, on a self-supporting or profit-making basis, one or more units of transportation facilities and equipment.

It may respond to an individual town's request to meet individually-tailored transportation needs whether it be for services or equipment.

It acts as the local regulatory agency to supervise and oversee fixed-route bus service on Cape Cod.

One welcome restriction imposed by law upon the Transit Authority is that it may

not directly operate its services. It must contract with private enterprise for the services it sponsors, thus enabling local private transportation companies to do what they do best... operate transportation services. It does so by providing them with secure funding sources to meet transportation needs as outlined by your town's voting member on the CCRTA Advisory Board. Uniform operating contracts give the Transit Authority the opportunity to annually review the performance of each private operator, leaving the Transit Authority free to hire the most efficient firm for each service it sponsors.



If you have questions or comments regarding the CCRTA, they may be addressed to Robert P. Warren, Administrator, Cape Cod Regional Transit Authority, P.O. Box 318, Barnstable, Mass. 02630. The CCRTA Advisory Board meets monthly and all meetings are open to the public.

Remember that the CCRTA is your Regional Transit Authority. We are eager to receive your suggestions as to how we can better meet your transportation needs.

### Cape Cod Regional Transit Authority

Gaston L. Norgoat, Chairman  
Robert P. Warren, Administrator

Doris W. Lorch, Executive Secretary  
Anthony D. Rogers, Administrative Assistant  
Michael J. Hornbrook, Transportation Analyst

Listed on the reverse side are the public transportation services available on Cape Cod. Air and water services are included in the chart, although these services do not fall under the jurisdiction of the CCRTA. Please feel free to contact the organizations that operate each service for further information.

Robert A. Parady, Chairman,  
Cape Cod Joint Transportation Committee  
Davo Lammann Jr., Senior Transportation Planner  
Dennis P. O'Leary, Jr., Transportation Planner

A Team of Professionals Bringing Public Transportation to Cape Cod

Figure IV-23

## Further Information

If you have questions concerning the SET Program, please contact the Lancaster Integrated Specialized Transportation System (LISTS) at 291-1243 or the Red Rose Transit Authority (RRTA) at 397-4246



# Special Efforts Transportation

Program  
for Handicapped Persons

## INFORMATION BROCHURE

REDACTED - 6010-10  
CERTIFICATION MASS TRANSPORTATION  
JULY 1, 1979, as amended

### Introduction

In order to assist semi-ambulatory handicapped persons in fulfilling their transportation needs and to meet requirements of Section 5 of the Federal Urban Mass Transportation Act of 1964, this Special Efforts Transportation (SET) Program was established by the Red Rose Transit Authority (RRTA) for the Lancaster Urbanized Area. This Program permits eligible handicapped persons to ride vehicles operated by carriers in the SET Program. Upon proper certification handicapped persons will be issued SET tickets allowing use of the service by presenting a ticket and a 50¢ fare to the vehicle operator. This service is available to certified persons for general purpose trips such as medical, work, shopping, banking, visiting friends, recreation, etc.

eligible for 'SET' transportation for trips not provided by the social service agency. The SET Program will not replace any Social Service agency program.

The SET Program will not cover interurban, charter, special or excursion services and will be provided only within the Lancaster Urbanized Area defined as the area within the second zone boundary of the RRTA bus system.

This service will be offered to eligible handicapped persons Monday through Saturday, from 5:00 a.m. until 7:00 p.m. SET transportation is not available on Sundays, or on the following holidays: New Years Day, Memorial Day, Fourth of July, Labor Day, Thanksgiving and Christmas Day.

### Fare

The fare for persons qualifying for the program is 50¢ per one way trip. Tickets will be provided at the time of certification and must be presented, along with the 50¢ fare, to the vehicle operator upon boarding the vehicle.

### Arranging Transportation

Once certified and tickets are received, trips must be arranged 24 hours in advance. Monday trips must be arranged no later than the previous Friday or Saturday. If you must cancel a previously arranged trip, do so at least one hour before the trip is to occur. To arrange your trip or cancel a previously arranged trip please call.

### Program Exemptions

Persons who are mentally and physically capable of using public transportation are not eligible for transportation under the SET Program. Eligible persons now provided transportation under an existing social service agency program are only

Friendly Taxi  
392-8433

Figure IV-24

# Charlotte

## Charlotte Transit System News

May 5, 1980

### APRIL BUS RIDERSHIP SHOWS 23% INCREASE

Charlotte Transit System (CTS) bus ridership continued its upward climb with an increase of 23.38% or 111,690 more riders as compared to April, 1979 figures.

A total of 589,300 revenue passengers were carried by CTS during this period. April was the ninth month out of the past ten months that revenue passengers exceeded the 500,000 mark.

Express bus ridership increased 439.78% over April, 1979 totals when 38,146 riders used the City's nine express routes. This represented a half a percent increase over those riding expresses in March, 1980.

Sales of monthly bus passes (TRAC) also increased in April by 216.37% over April of last year. April was the second month in a row that over 1,000 TRAC passes were sold, with 1,182 bus riders buying passes.

For the first 10 months of CTS's fiscal year (July, 1979 - April, 1980), total revenue passengers increased by 20.63% when 932,067 more passengers were carried over the same period last year.

Express buses transported 223,851 more riders - an increase of 441.03% - than were carried from July to April last year. Sales of TRAC passes also increased by 186.23% during this period.

-30-

#### For more information, contact:

Mary Jackson, Director of Marketing  
Charlotte Transit System  
374-3234

Figure IV-25

# Transportation Update in Westchester County: Progress Through Partnerships



## Westchester County

By Joseph J. Petrocelli  
Associate Planner  
Westchester County

**Department  
of Transportation** As the Westchester County Department of Transportation (WCDOT) moves ahead to improve transportation, we are guided by the goal of providing a balanced, environmentally sensitive, network of safe, economical and efficient transportation for the residents of Westchester County.

therefore, has been to work through a series of partnerships with the federal, state and local governments as well as the private sector to plan, finance and implement the improvements necessary in achieving our goal. Working through partnerships has in the past and will continue to be in the future one of the most viable strategies followed in bringing about concrete improvements to the County's transportation system.

Bus Transit Coordination

and Innovation

Westchester County will continue to provide bus service to approximately 24,000,000 passengers in 1979 through a unique public/private partnership whereby 16 privately owned companies - under contract to the County - are responsible for the day-to-day operations of the transit system and the WCDOT is responsible for the management, planning, financing and

equipping or the system. Under this arrangement, the County - with financial assistance from federal and state partners - provides operating assistance and capital equipment to the private operators. Thus, the contracts with each of the individual companies participating in the operating assistance program enables the County to specify the details of the transit services (i.e. routes, schedules and fares) to be provided by the private operators.

Department of Transit in 1970 - renamed the Department of Transportation in 1974 to reflect its involvement in highway and rail matters - bus transit in the County has evolved from an uncoordinated network of bus routes with a variety of complex fares into a coordinated, tightly managed "system." Management improvements have included:

1. Elimination of all zone and zonal fares;
2. Institution of a standard \$.50 fare on all routes.

3. Implementation of a \$ .10 transfer charge between any two connecting lines regardless of which company operates the service.
4. Production of a system-wide transit map;
5. Development of uniform timetables for all the County's bus routes;
6. Provision of a monthly 20 ride communication book.

[\$9.00/book) and an unlimited use monthly bus Pass called the "PASSPORT". (\$20.00/month); and 7. Provision of a "HomeFree" pass. The 20 ride commutation book, the unlimited use "PASSPORT" and the "HomeFree" pass are just three innovations Westchester's transit system that have made transit use more convenient.

Commuter Rail

While the principal responsibility for providing rail service rests with Conrail under contract to Metropolitan Transportation Authority (MTA), County has a direct interest in the service provided, unless this service is related to economic development and economic development Westchester will cease to be a desirable place for New York City workers to live and this in turn will have an adverse effect on the real estate values and economic development Westchester County. Moreover, the rail line is not now serving a local function principally because fares for short distance intra-County travel. In recent years, therefore, County has requested MTA to make improvements and changes that rail lines will serve local need and will obviate the necessity for the County to provide duplicating service on its bus system.

Size: Nothing smaller than an 11-inch by 13-inch poster should be produced. This size is easily visible and readable, yet not so obtrusive that a store would refuse its posting.

Format: It should be typeset in at least 12-point type. While some liberties can be taken with style, it is best to use simple, readable faces. Once again, continuity among printed pieces should be adhered to. The poster should look like it comes from the same family as other printed pieces. Remember to leave some open areas (white areas). A poster is like a transit ad--make the message simple.

Printing: Posters can be printed or silk screened. Generally, when small quantities are used along with multiple colors, it is less expensive to have posters silk screened. Single color or larger quantity runs (200+) most often can be most economically produced by a printer.

The advantage of using posters is that you can get your information to outlets other than transit facilities, thus increasing your chances to be seen by non-riders. When you produce such professional pieces, you want to make sure the public receives them. Following are some methods for distributing printed aids:

- Schedule or Brochure Racks - Made from plastic or wire, these are holders for pocket-size brochures, schedules, maps or the like. They can be mounted on the bus or be free-standing and placed in other public places, such as banks. They can be custom-designed or purchased in standard sizes from transit suppliers.

- "Take-One" Pockets - These are cardboard pockets designed to be attached to counter cards or interior transit ads.
- Utility Mailings - Working with utility companies can be most cost-efficient. The bills go out anyway; an inclusion is easily handled. It provides you with a broad-based contact in the community at limited cost.
- Door-to-Door Handouts - This method is usually the least effective because it is costly and time-consuming.

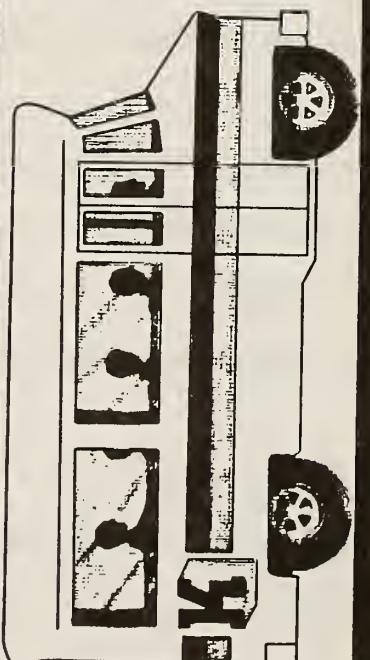
Figures IV-27 through IV-31 are examples of posters designed to serve a variety of purposes.

Paid Advertising - Paid advertising is time or space bought on radio/TV or in print. Because of the high costs involved, it is used more for promotional or awareness themes than for information dissemination. Print can be used more easily as an information aid than can radio/TV. For example, a reprint of time schedules can be placed in the paper.

Public service coverage is free time or space from the media. It is generally more common to see local transit news releases in print, rather than public service display advertising. Radio and television stations will carry news items but will also provide time for public service announcements.

Design criteria and guidelines for Newspaper Ads include the following:

# "BE SMART RIDE KART!"



## FREE RIDE COUPON!

**TRY US — ON US!** You'll see how smart riding on KART really is. Call KART at 648-0101, twenty-four hours in advance to be picked up. Hand our driver this coupon and you travel one way for nothing. For your return trip, our regular low fares apply. Coupon good June 16 - 27, 1980.



If you plan to use KART regularly, save additional money with our discount KART pass. Ask our driver about it.

## FREE RIDE COUPON!

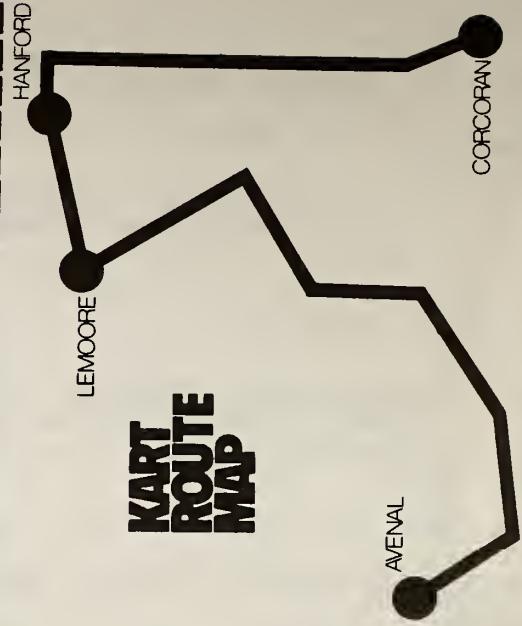
**Save money, save gasoline,  
and keep going.**

Riding on Kart is the newest way to get around in Kings County without the bother of cars or the cost of gasoline. Our buses are new, so is our service. With KART, you can travel town-to-town or door-to-door in Avenal, Corcoran, Hanford, and Lemoore.

Our fares are low . . . No trip costs more than \$1! Look for our brochure for complete details on fares and schedules.

## **Be Smart, Ride KART — Free!**

Get to know your bus service. Use the coupon below for a free ride on KART. Let us take you shopping, to the doctor, the lawyer, the train — wherever you want to be. Travel is easy when you choose the smart, KART way.



You're home free  
on A&MRTS with your  
Shopper's Free-Ride-Home ticket!



ARCATA & MAD RIVER  
TRANSIT SYSTEM



**COLT**  
brings you...

- RELIABLE
- SAFE
- CLEAN
- Bus Service

**COLT**

**OPERATING**

Monday - Friday

6 A.M. - 6 P.M.

Saturday

7 A.M. - 6 P.M.

Providing hourly transportation  
in the Greater Lebanon Area.

For Immediate Schedule  
Or Route Information:

DIAL COLT  
INFORMATION  
LINE AT—

**274-3664**

Figure IV-29

# NOTICE

**THESE CITY BUS  
ROUTES WILL BE  
AFFECTED BY  
JUNE 2<sup>nd</sup>  
CHANGES:  
2, 8, 12, 13,  
16, 17, 29, 39X,  
45X, 66X, 72X.**

**For Information:**

- Get a new timetable
- Ask your driver
- Call 374-3366

**DON'T MISS  
THE BUS!**

 Charlotte Transit System

# NOW YOU CAN GO CROSSTOWN WITHOUT DOING THE SQUARE ROUTE.

March 3, 1980, Charlotte Transit's Route #29 will become Charlotte's first crosstown route—with no transferring at the Square. And, look at all the other route connections available. We're making it easier all the time.

Route #29 is the latest in Charlotte Transit's efforts to give you the best service we possibly can. As fuel becomes more scarce and more expensive, it seems that Charlotte's future is riding on our buses. We pledge our best efforts to filling that need.

For more information about Route #29 and other route changes: get a new timetable, ask your driver or call Charlotte Transit Information at 374-3366.

## Charlotte Transit System

Charlotte's going places and Charlotte Transit'll get you there.



## OTHER CITY BUS ROUTES AFFECTED BY MARCH 3rd CHANGES: **2, 4, 39X, 40X, 49X, 50X, 64X, 65X**

(ROUTE #29 REPLACES 49X)

Continuity/Theme: Each ad should be prepared as part of an overall campaign. Do not create it in a vacuum; make it a building block to achieving the end set forth in your stated objective. If your goal this year is to build off-peak hour ridership and an objective is to make the public more aware of your service, do not prepare an ad about commuter passes; prepare an ad about your discount fare from 9:00 A.M. to 3:00 P.M. or your special shopper's shuttle service. In other words, plan your ads to work with your projects.

Approach: Think like the rider. What would you want to know if you were going to ride? Remember that your system is a public service; you must come across as such. Do not be mysterious and do not use jargon. Use words the public can understand. Be as professional in your ads as you are in your service. Here, again, you are judged by what image you project.

Layout Presentation: Try to prepare a format that you can use each time so that your ads are easily recognized. That may just mean using your logo in the bottom right-hand corner each time, or using the same size ad each time, or even preparing all ads with a border around them and a certain style art.

Type: Be sure to either typeset the copy or use a good electric typewriter to ensure professional looking ads. If necessary, get the art department form the local newspaper or your local advertising agency to

lay out the ad for your approval. Remember to leave some white space so it does not look too complicated.

Frequency: Obviously, this depends upon budget. Work with your local media representative to determine the best day, week and month to advertise and the best location in the paper. Translate that information and the costs into budget terms in order to make your decisions.

Design criteria and guidelines for Radio/TV ads include the following:

Continuity/Theme: Radio/TV ads should also tie in to an overall campaign effort. They must not, however, attempt to achieve their central purpose by the same means as a newspaper ad; they are different media. Here, the message must come through quickly and simply. Use key words or phrases that are also used in newspaper ads so that connections are made mentally.

Approach: Preparing radio or TV ads requires at least some professional advice. The media will supply this to you (on a limited basis) because you are spending money with them. Do not expect them to go to elaborate lengths--that is what advertising agencies are for. But if your budget is limited, the media people can at least smooth out the rough edges for you. They know what works.

Presentation: Use professional voices, even if they are local disc jockeys. They are trained to be understood and to emphasize the right words or phrases. Take their advice (or that of an ad agency) regarding copy approaches or tone. They are the professionals in that field.

Time/Frequency: Again, this element depends upon budget and ad purpose. When trying to reach housewives, mid-day spots (spot announcements) are good. Commuters are better reached from 7:00 A.M. to 9:00 A.M. and 4:00 P.M. to 6:00 P.M. Your research will tell you who you want to reach. Your theme should be designed to attract your audience and the media time must also fit. Sit down with the media representative and find out when you can most effectively spend your money to reach that audience. Do not spend all your budget at once. Spread it out even if you need to be off the air a week, then on a week. Repetition builds reputation.

Figures IV-32 through IV-41 provide media ad ideas prepared by Michigan DOT.

Public Service Advertising - The types of advertising that are usually accepted by all the media as public service include the following items:

Announcements:

- Route changes
- New services
- Expansions (new facilities development)
- Equipment additions
- Employee hiring/retirements

# Join Our Wait Reduction Program!



**Come On... Ride The Bus.**

You'll get much faster service during our "off-peak" hours from \_\_\_ to \_\_\_ and \_\_\_ to \_\_\_. Join our wait reduction program. Call during off-peak hours. Thanks!

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-32



Transportation Makes Michigan Move

# Call For The Easy-Rider



## Ride The Bus

If you're a handicapper . . . we've got a sure way to get you just about anywhere you want to go around town. Call for a lift-equipped bus, and we'll pick you up right at your door. Our buses give you the freedom you want . . . at just 25¢ a ride. So come on! Ride the bus.

**Call 000-0000**

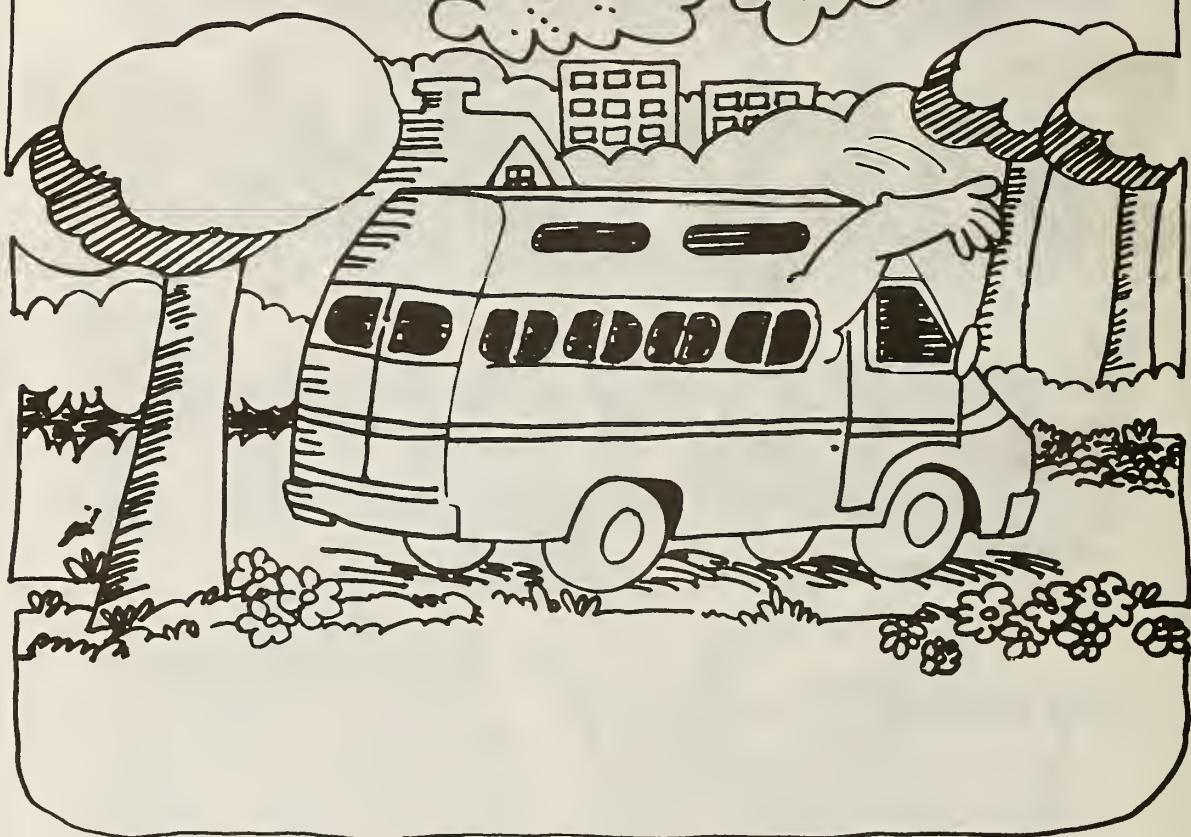
LOCAL BUS IMPRINT

Figure IV-33

Transportation Makes Michigan Move



# We're Going Your Way!



**Call A Bus.** Just about anywhere you aim to go around town, we're going your way. So give us a call and ride for just 50¢ (only 25¢ for children, seniors and handicappers). We'll pick you up at your door and take you to your destination. Try us, you'll like us.

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-34



Transportation Makes Michigan Move

# One Size Fits All



**So Come On...  
Ride The Bus**

Big or small, short or tall, it's so easy to call and have us pick you up at your door. We even have lift-equipped buses for handicappers. Call us soon . . . and see how nicely we fit your travel needs around town.

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-35

Transportation Makes Michigan Move



# Need A Ride? Call A Friend.



Call for a pick-up by bus. We travel right in your neighborhood, and we'll take you just about anywhere you want to go. Like a friend! Next time you need a ride, call a friend. Call a bus.

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-36

Transportation Makes Michigan Move



# We're Going Your Way!



## National Transportation Week May 13-19

**Call A Bus.** Today, more than ever, the bus is one of your best transportation buys. Find out why. Now! During National Transportation Week. Just call and have a bus pick you up. We'll take you almost anywhere you want to go for just 50¢ (25¢ for seniors, handicappers and children). Call today!

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-37



Transportation Makes Michigan Move

# Meet Our 100,000th Rider



(name) \_\_\_\_\_ became our  
100,000th rider on  
(date) \_\_\_\_\_. Every day,  
more folks are discovering  
the convenience of riding  
the bus. Call us for a ride  
soon. We're going your  
way!

**Call 000-0000**

**LOCAL BUS IMPRINT**

Figure IV-38



Transportation Makes Michigan Move

# Radio Copy

INSTRUCTIONS:



Michigan Department of Transportation

COMMERCIAL NO.: 006

SUBJECT/TITLE: Handicapper

LENGTH: :10 Bed for :30 Spot

AIR DATES:

Use Cut# 3

---

Jingle Opening

ANNOUNCER: IF YOU'RE A HANDICAPPER...YOU

CAN RIDE

(name of bus)

FOR JUST 25 CENTS. OUR SPECIAL,

LIFT-EQUIPPED BUS CAN TAKE YOU

JUST ABOUT ANYWHERE YOU WANT

TO GO. CALL US!

Jingle Closing

# # #

# Radio Copy

INSTRUCTIONS:



Michigan Department of Transportation

COMMERCIAL NO.: 003  
SUBJECT/TITLE: We Fit All Sizes  
LENGTH: :52 Bed for :60 Spot  
AIR DATES:

Use Cut# 2

Music Under to Jingle Close

ANNOUNCER: NO MATTER WHETHER YOU'RE BIG  
OR SMALL...SHORT OR TALL...THERE'S  
A BUS IN TOWN THAT FITS BOTH  
YOU AND YOUR WALLET...PERFECTLY!

IT'S \_\_\_\_\_.  
(name of bus)

WE FIT PERFECTLY INTO YOUR  
SCHEDULE TOO. SIMPLY CALL US  
ABOUT \_\_\_\_\_ MINUTES BEFORE  
YOU'RE READY TO LEAVE. IN  
MOST CASES...WE'LL PICK YOU UP  
AT JUST THE RIGHT TIME.

AND LISTEN TO HOW WELL WE FIT  
YOUR BUDGET. JUST 50 CENTS  
FOR ADULTS... 25 CENTS FOR  
CHILDREN...SENIORS AND HANDICAPPERS.  
ONE FARE TAKES YOU ALMOST  
ANYWHERE YOU WANT TO GO AROUND  
TOWN.

\_\_\_\_\_ IS AVAILABLE  
(name of bus)  
FOR RIDES \_\_\_\_\_ SO  
CALL \_\_\_\_\_ (give days and times)  
(name of bus)  
SOON. OUR NUMBER IS \_\_\_\_\_  
THAT'S \_\_\_\_\_ (phone number).  
(repeat phone number)  
SEE HOW WELL WE FIT YOUR DAILY  
TRAVEL NEEDS.

Jingle Closing

# Radio Copy

INSTRUCTIONS:



Michigan Department of Transportation

Use Cut# 4

COMMERCIAL NO.: 009  
SUBJECT/TITLE: Take A Bus To Lunch  
LENGTH: :40 Bed for :60 Spot  
AIR DATES:

## Jingle Opening

ANNOUNCER: INVITES  
(name of bus system)

YOU TO TAKE A BUS TO LUNCH.  
OUR BUSES ARE VERY FRIENDLY  
AND USUALLY QUITE PROMPT!

IT'S EASY TO TAKE A BUS TO  
LUNCH. JUST CALL                   
ABOUT                  MINUTES BEFORE  
YOU'RE READY TO LEAVE. IN  
MOST CASES...YOUR FRIENDLY BUS  
WILL PICK YOU UP AT JUST THE  
RIGHT TIME.

TAKING A BUS TO LUNCH ISN'T  
EXPENSIVE EITHER! JUST 50  
CENTS FOR ADULTS...25 CENTS  
FOR CHILDREN...SENIORS AND  
HANDICAPPERS.

SO COME ON! TAKE A BUS TO  
LUNCH...OR DINNER...OR SHOPPING...OR  
WORK...OR SCHOOL...OR VISITING...OR  
JUST ABOUT ANYWHERE.

CALL                  AT                   
(name of bus)      (phone number)  
THAT'S                   
(repeat phone number)

## Jingle Closing

###

Figure IV-41

Information about major transportation issues:

Budgets  
New federal regulations affecting local transit  
Council recommendations  
Vote (bond) issues  
New management approaches

Contact persons for print media are editors, city reporters, or transportation reporters. For radio and TV stations, the contact is the station manager. You may be referred to the program director or news director, but begin with the station manager. Radio and TV stations will accept prepared scripts or completed spots for public transportation. Public service announcements are regularly run by stations, so consult your local station about running materials you may want to prepare.

Follow the same guidelines for preparing public service advertising as for paid advertising. Quality products will be carried by the media more often.

Because of the cost considerations cited and the ever-present problem of limited resources, it can be helpful to employ your survey and other research efforts to determine the most effective means of getting the most for your advertising dollars. Figures IV-42 through IV-44 reflect the tabulated results of a survey undertaken in Alma, Michigan prior to an advertising campaign for its dial-a-ride system. Note that word-of-mouth, the bus system telephone information operator, and the newspaper

QUESTION 27  
IF YOU WERE INTERESTED IN  
FINDING OUT MORE ABOUT DIAL-  
A-RIDE SERVICE, WHICH OF THE  
FOLLOWING WOULD YOU MOST  
LIKELY RELY ON TO BE HONEST  
AND ACCURATE.....

# MEDIA SURVEY RESULTS

ALMA

	USER	NON USER	FAVOR IMPRV	TIME IMP	TRIPS /---25-44---/ 9-3 MALE FEMALE 55+	HOUSE 10K	LESS 10K+ WIFE	ZONE ONE	ZONE TWO	ZONE THREE
1. RADIO										
2. TELEVISION	■	■	■	■	■	■	■	■	■	■
3. DAILY NEWSPAPER	■	■	■	■	■	■	■	■	■	■
4. WEEKLY NEWSPAPER ADVERTISING IN MOVIE THEATRE										
5. YELLOW PAGES	■									
6. FRIEND OR NEIGHBOR	■	■	■	■	■	■	■	■	■	■
7. A PUBLIC OFFICIAL	■	■	■	■	■	■	■	■	■	■
8. THE BUS DRIVER	■	■	■	■	■	■	■	■	■	■
9. THE DART BUS INFORMATION OPERATOR	■	■	■	■	■	■	■	■	■	■
10. SOMEONE WHO HAS RIDDEN THE BUS	■	■	■	■	■	■	■	■	■	■
11. A DART REPRESENTATIVE										
12. A SMALL POSTER OR SIGN										
13. MAIL ABOUT DART SERVICE										
14. SEEING THE BUS FULL OF PEOPLE SEEING THE BUS WITH LOTS OF ROOM ON IT										
15. THE GENERAL APPEARANCE OF THE DART BUS										
16. YOUR OWN EXPERIENCES RIDING DART	■	■	■	■	■	■	■	■	■	■

08-158--  
168-358--  
168-608--  
618-1001--

Figure IV-42

# MEDIA SURVEY RESULTS

ALMA

QUESTION 26  
WHICH OF THE FOLLOWING SOURCES  
DO YOU MOST OFTEN TURN TO FOR  
OPINIONS YOU CAN AGREE WITH...

	NON USER	FAVOR DART ENCOUR	IMPRV IMP	TIME TRIPS / 9-3	25-44---/ MALE	HOUSE WIFE	LESS 10K	ZONE ONE	ZONE TWO	ZONE THREE
1 RADIO	■	■	■	■	■	■	■	■	■	■
2 TELEVISION										
3 DAILY NEWSPAPER	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
4 WEEKLY NEWSPAPER										
5 ADVERTISING IN MOVIE THEATRE				■	■	■	■	■	■	■
6 YELLOW PAGES	■	■	■	■	■	■	■	■	■	■
7 A FRIEND OR NEIGHBOR	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
8 A PUBLIC OFFICIAL	■		■							
9 THE BUS DRIVER	■									
10 THE DART BUS INFORMATION OPERATOR	■									
11 SOMEONE WHO HAS RIDDEN THE BUS	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
12 A DART REPRESENTATIVE										
13 A SMALL POSTER OR SIGN										
14 MAIL ABOUT DART SERVICE										
15 SEEING THE BUS FULL OF PEOPLE										
16 SEEING THE BUS WITH LOTS OF ROOM ON IT										
17 THE GENERAL APPEARANCE OF THE DART BUS					■					
18 YOUR OWN EXPERIENCES RIDING DART	■■		■	■	■	■	■	■	■	■

0%-15%--

16%-35%--

16%-60%--

61%-100%--

Figure IV-43

# MEDIA SURVEY RESULTS

QUESTION 25  
WHICH OF THE FOLLOWING SOURCES  
WOULD YOU SAY ARE MOST RESPON-  
SIBLE FOR YOUR CURRENT IMPRES-  
SION OF THE DART SERVICE.....

ALTA

		NON USER	FAVOR DART ENCOUR	IMPRV IMP	TIME TRIPS /---25-44---/ 9-3 MALE FEMALE	55+ HOUSE WIFE	LESS 10K	ZONE 10K+	ZONE ONE	ZONE TWO	ZONE THREE
1 RADIO		■				■					
2 TELEVISION											■■
3 DAILY NEWSPAPER	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
4 WEEKLY NEWSPAPER				■							
5 ADVERTISING IN MOVIE THEATRE						■					■■
6 YELLOW PAGES	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
7 A FRIEND OR NEIGHBOR	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
8 A PUBLIC OFFICIAL											
9 THE BUS DRIVER	■										
10 THE DART BUS INFORMATION OPERATOR											
11 SOMEONE WHO HAS RIDDEN THE BUS	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■	■■
12 A DART REPRESENTATIVE											
13 A SMALL POSTER OR SIGN					■						
14 MAIL ABOUT DART SERVICE											
SEEING THE BUS FULL OF PEOPLE					■						
SEEING THE BUS WITH LOTS OF ROOM ON IT											
THE GENERAL APPEARANCE OF THE DART BUS					■						■
YOUR OWN EXPERIENCES	■■■	■■■	■■■	■■■	■■■	■■■	■■■	■■■	■■■	■■■	■■■
18 RIDING DART											

08-158---  
168-358---  
368-608---  
618-1008---

Figure IV-44

were the principal means of communication identified by system users.  
The survey question asked of the respondents appears in the upper left-hand side of the results form.

## Merchandising, Promotions and Special Services

For our purposes, merchandising and promotion involve the process of identifying special groups with particular needs and preparing a special presentation, item or service designed to attract their attention, develop their awareness of services, and encourage them to ride. You will notice that a potential merchandising or promotion objective could develop directly out of target group marketing research efforts. Merchandising and promotional activities could take many different forms. However, they usually involve a specific group of people with identifiable special activities.

A possible approach to the development of special groups as a marketing and business opportunity might take the following steps:

- List area clubs; business groups; and special-interest organizations, including special characteristics, contact persons, and possible travel needs (on a regular or "chartered" basis).
- Contact all groups and plan for a presentation to management and members on the benefits of public transit and how it can fit their needs.
- Outline and coordinate group and individual needs with your system's solutions.
- Encourage regular projects, such as employee commuting services.
- Encourage special projects, such as seasonal, weekly, or other group services; discounts; and other incentives to ride.

You could probably fill your entire calendar with special community events of one kind or another. What you want to concentrate on are those events that include a sizable or special portion of your community where the transportation system can provide a service. Think about festivals, fairs, special sales, athletic events, and other happenings in your community. You may want to institute special shuttle service out to the fair grounds; you may be able to set up a cooperative promotion with merchants to bring shoppers to sidewalk sales or seasonal sales; you may be able to instigate charter service for special athletic events. Any event that may have transportation problems can be a special event for the transportation system.

There are also facilities that should be considered when you are looking for ways to make your service more effective. Municipal swimming pools, ice/roller rinks, theaters, senior citizen centers, and other key activity areas should also be examined with an eye on making their clients public transportation users.

Lacking a special occasion or area, think about times or days when demand is slow for your system and ways to get more people on your buses. Look into cooperative ventures with businesses or shopping centers; contact activity directors; get in touch with area clubs. There are a lot of people traveling at any given time of the day--try to get them traveling on your buses.

Promotions are an area where you can go out and toot your own horn. You should exercise some caution in planning your promotional activities. Remember you are supported by subsidies and do not want to appear frivolous to the public. With that in mind, look for ways you can get new riders and keep existing riders happy with the service. Perhaps you may want to cut your fare for some specified period of time. You may want to approach some special group and offer them a discount, or even a free ride, to introduce them to your service. Maybe you want to clean up your entire fleet and use it to carry dignitaries in a local parade just to keep your system in the public's eye.

Giveaways can be used from time to time to promote your system. Anything you give away is probably going to be a direct expense and should be carefully considered. Ideally, a giveaway should have some utility for your users and be something they will keep around and remind them of your service. There are exceptions that should be weighed, such as giving out free balloons to kids during a civic celebration just to demonstrate community involvement.

If you decide to become involved in a giveaway program, be sure to check your sources of supply for both delivery and possible reorder requirements. You do not want to get involved in commitments you cannot live up to.

Some possible merchandising items, listed according to the user groups for which they might be appropriate, are presented in Figure IV-45.

## FIGURE IV-45

### MERCHANDISING ITEMS

#### HOUSEWIVES

- Shopping bags
- Shopping cart reminder decals
- Cash register decals
- Coupon ads
- Rain bonnet/shoe shields
- Newspapers on buses
- Posters
- Off-peak ride discounts
- Free return trips
- Discounts on merchandise (cooperative)
- Metric scale rulers
- Note pads
- Three-foot tape measures
- And much more...

#### SENIOR CITIZENS

- All of the above, plus -
- Pocket magnifying glasses
- Coin purses
- Theater tickets
- Other tour or shopping packages
- Discounts to dine out
- And more...

#### COMMUTERS

- Newspapers
- Hand warmers
- "Refreshment" tickets
- Coffee
- Discount tickets
- Special/various lunch tours (to and from office)
- All-day "on and off" riding privileges (at a special price)
- And more...

#### YOUTH

- Imprinted frisbees, tee-shirts, transfer decals
- Posters
- Saturday shopping/theater tours
- Evening tours
- Coloring books
- Book covers
- Folders
- Pencil sets
- And more

Keep in mind that special promotions are usually aimed at getting non-riders aboard to try the system. You are trying to change their transportation habits. To make a lasting, positive impression, the system must prepare itself for a special promotion. Vehicles should be clean, schedules met, employees particularly courteous, and system information readily available. Use promotions to get the non-user aboard; but polish your image carefully to keep them coming back.

### Equipment

Marketing is concerned with the people aspects of the vehicle--its appearance, size, and interior comfort considerations. These have a direct bearing on a person's decision to ride. The vehicle is one of the most visible elements of the system and, to many, it is the system. It must be used as an attraction and a positive selling point. To do so, its appearance must leave a good impression or it is too easily dismissed as not being an alternative to the car.

Projects must be implemented to help create and maintain a good impression of the equipment and the system, as well. Vehicle appearance and maintenance also affects public reaction to safety and dependability factors. If the vehicle looks as though it will break down at the next corner, or that it will skid in the rain, the public confidence level will not be high. This will also deter potential ridership.

### Goal

To offer to the public visually appealing vehicles containing interior comforts that meet their physical and psychological needs.

### Objectives

- . To make existing equipment as comfortable and attractive as possible;

- . To consider new equipment vehicle specifications for interior components dealing with colors, materials, noise, and comfort; and
- . To consider involving the public in the decision-making process for the design features of the exterior and interior on new equipment.

### Projects and Activities

While not a remedy for problems of system image, improved appearance can signal a new beginning for a transportation system. Thus, these suggested projects should be tied to other system improvement projects to give the new appearance meaning and purpose.

Consider a New Paint Scheme - Get professional advice on this to ensure quality. Involve the community in selecting a final choice. If ordering new equipment within 18 months, use the design on the new equipment only. If you plan to use the old equipment for longer than 18 months, design the scheme around the older equipment as well. Coordinate other vehicles, such as maintenance trucks, to match new colors. Coordinate all interior colors, including seats, floors, and sidewalls, to match exterior colors.

Vehicle Cleanliness and Appearance - Repair any damage to the vehicle, from broken or cracked windows to ripped seats. Encourage drivers and mechanics to clean up after themselves when leaving the bus. Wash and

clean the buses as often as possible--daily is preferable. Keep vehicles in good mechanical condition to minimize breakdowns.

Design the interior of the bus for the customer first, and for ease of maintenance second. Keep signs and frames well-maintained on exterior advertising. Take measures to cut down on noise levels on old and new equipment; strive for 85 decibels. Have sidewall lighting installed when ordering new equipment and investigate installation of package racks for passenger convenience.

Public Involvement - Before the next vehicle order, involve the public by having citizens assist in decision-making about some vehicle improvements, including: exterior paint design; choice of vehicles (large and small); seat style, material, and color; seating arrangements; lighting; and interior colors and materials. Devise a contest for, and promote, logos and color schemes.

Equipment Design and Color Schemes - Transit vehicles must reflect the personality and character of the transit marketing program and show the public that progress is being made toward developing a fully coordinated transit system. Figures IV-46 through IV-48 show optimal paint schemes on a standard 35-foot urban bus, a 20- to 25-foot small bus, and a maxi-van. Various other paint schemes for various purposes are also shown on a common base bus, which could be adapted to other bus makes and sizes.

**Optimum Paint Scheme: 35-Foot Urban Bus**

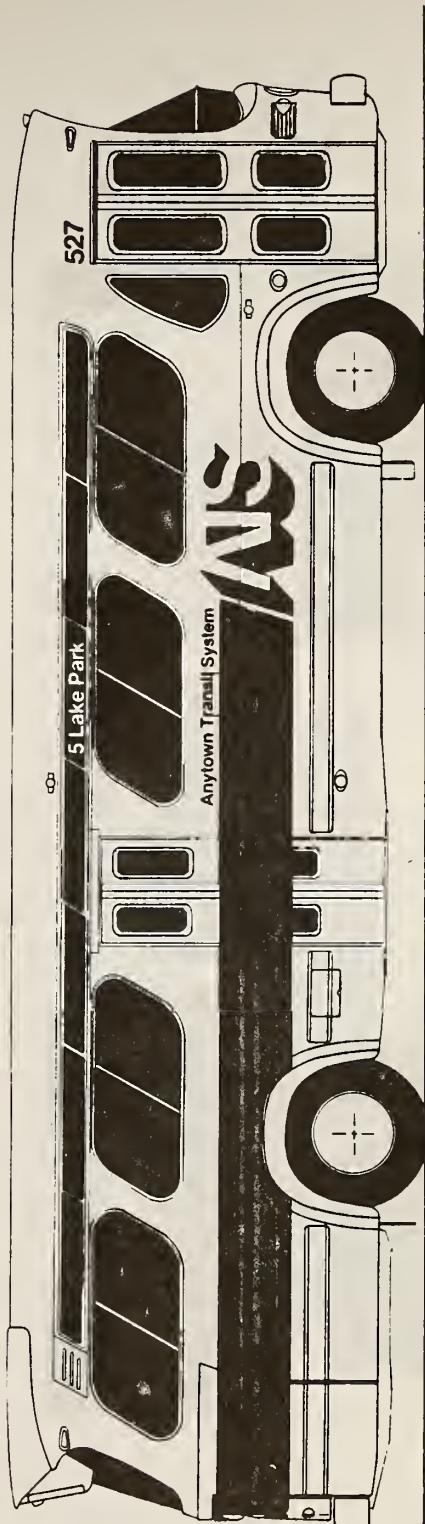


Figure IV-46

**Optimum Paint Scheme: 20- to 25-Foot Small Bus**

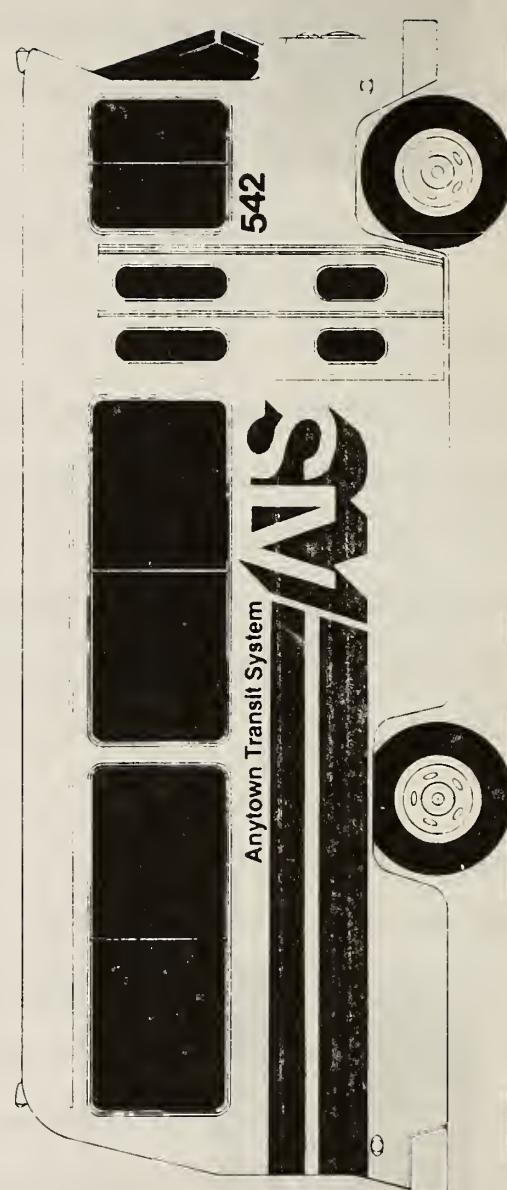
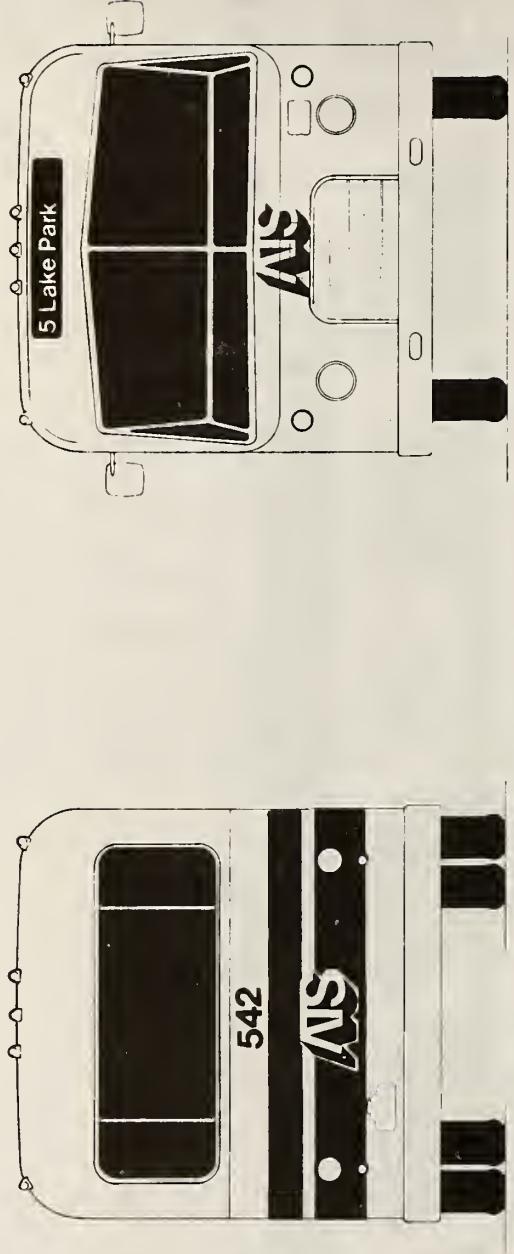


Figure IV-47

Optimum Paint Scheme: Maxi-Van

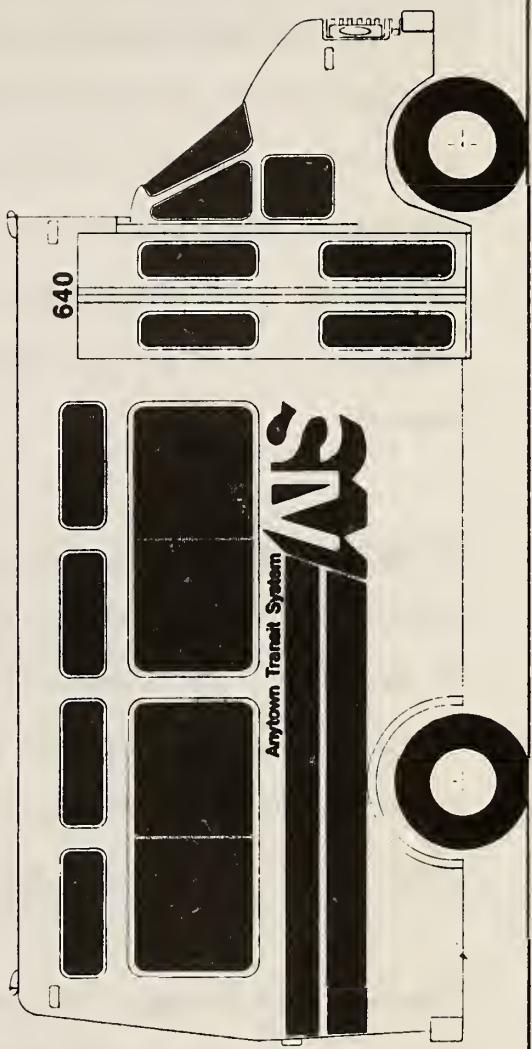
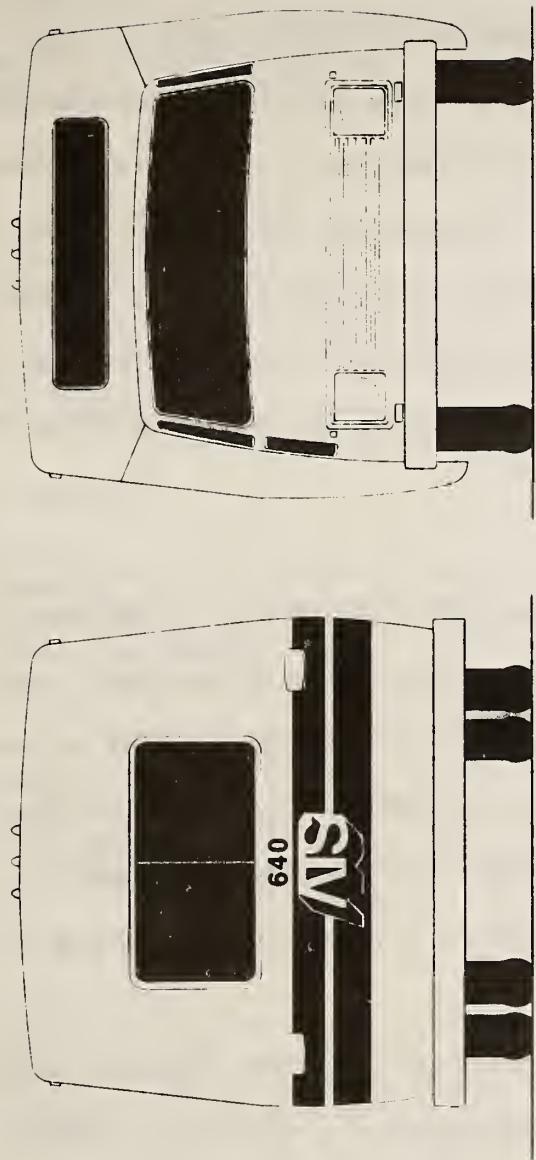


Figure IV-48

When developing your paint scheme, make sure the elevations of your actual bus make and model are correctly utilized.

For any paint scheme, you should specify the latest durable transportation finish compatible with the system's refinishing capabilities.

Give special consideration to the newer, more durable urethane-based finishes which can reduce future maintenance costs. Local representatives of major paint manufactureres can describe the transportation or commercial-grade finishes now available. You should choose standard colors and avoid expensive or difficult-to-match mixed colors. Self-adhesive vinyl or decals can be used for striping, small lettering, or numerals.

Preventive Maintenance Program - Preventive maintenance is the most important program for keeping your vehicles moving with the least amount of down time. Well-maintained vehciles will give added months or years of reliable service and will minimize breakdown. Preventive maintenance, as the name implies, means establishing a program that will catch possible mechanical problems before failure occurs.

Figures IV-49 through IV-52 are examples of forms that could be adapted to a small vehicle system for implementation of a preventive maintenance and reporting system. Each form should be modified to handle any needs or reporting requirements particular to your system. Note in

## PRE-TRIP INSPECTION TEST

### DAILY VEHICLE CHECKLIST

DATE \_\_\_\_\_ VEHICLE \_\_\_\_\_

MILEAGE end \_\_\_\_\_

VEHICLE DEFECT LIST

start \_\_\_\_\_

NOTE ANY DEFECTS BELOW

daily total \_\_\_\_\_

### I. EXTERIOR

Tires \_\_\_\_\_

Turn signals \_\_\_\_\_

Head lights \_\_\_\_\_

Tail lights \_\_\_\_\_

Fresh body damage \_\_\_\_\_

Windshield wipers \_\_\_\_\_

Cleanliness \_\_\_\_\_

### 2. INTERIOR

Brakes \_\_\_\_\_

Steering \_\_\_\_\_

Transmission \_\_\_\_\_

Safety equipment:

fire extinguisher \_\_\_\_\_

flares \_\_\_\_\_

first aid kit \_\_\_\_\_

Dash gauges \_\_\_\_\_

Radio \_\_\_\_\_

Fresh damage \_\_\_\_\_

Cleanliness \_\_\_\_\_

### 3. UNDER HOOD

Maintenance Performed

Oil level \_\_\_\_\_

Radiator level \_\_\_\_\_

Battery level \_\_\_\_\_

Windshield wiper fluid level \_\_\_\_\_

Engine \_\_\_\_\_

FUEL ADDED \_\_\_\_\_ gal.

OIL ADDED \_\_\_\_\_ qts.

MILEAGE AT FUELING \_\_\_\_\_

DRIVER SIGNATURE

MECHANIC SIGNATURE

**PREVENTIVE MAINTENANCE  
INSPECTION WORK SHEET**

VEHICLE NO. \_\_\_\_\_

- OK  
 ADJUSTMENT MADE  
 NEEDS ATTENTION

PERFORM MONTHLY  
ALL DART VEHICLES

DATE \_\_\_\_\_

MILEAGE \_\_\_\_\_

**SPECIAL INSTRUCTIONS  
FOR REPAIRS NEEDED**

**PREPARE FOR INSPECTION**

- |   |                                       |
|---|---------------------------------------|
| <input type="checkbox"/> CHECK DRIVERS REPORT       | <input type="checkbox"/> WASH VEHICLE |
| <input type="checkbox"/> REVIEW MAINTENANCE HISTORY |                                       |

COMMENTS

**START UP AND DRIVE (CHECK OPERATION OF:)**

- |  |                                       |
|--|---------------------------------------|
| <input type="checkbox"/> STARTING      | <input type="checkbox"/> TRANSMISSION |
| <input type="checkbox"/> PARKING BRAKE | <input type="checkbox"/> HORN         |
| <input type="checkbox"/> SERVICE BRAKE | <input type="checkbox"/> SPEEDOMETER  |

**REMAIN IN VEHICLE (CHECK OPERATION OF:)**

- |   |  |
|---|--|
| <input type="checkbox"/> FUEL GAUGE                 | <input type="checkbox"/> 4 WAY FLASHER, INDICATORS |
| <input type="checkbox"/> OIL GAUGE                  | <input type="checkbox"/> INTERIOR LIGHTS           |
| <input type="checkbox"/> BATTERY CHARGING GAUGE     | <input type="checkbox"/> INSTRUMENT PANEL LIGHTS   |
| <input type="checkbox"/> WINDSHIELD WASHER & WIPERS | <input type="checkbox"/> HEATER & DEFROSTER        |
| <input type="checkbox"/> STEERING WHEEL FREE PLAY   | <input type="checkbox"/> AIR CONDITIONER           |
| <input type="checkbox"/> REGISTRATION               | <input type="checkbox"/> ALL WINDOW GLASS          |
| <input type="checkbox"/> HEAD LIGHTS, HI INDICATOR  | <input type="checkbox"/> DOORS                     |
| <input type="checkbox"/> HEAD LIGHTS, LOW           | <input type="checkbox"/> SEATS                     |
| <input type="checkbox"/> TURN SIGNAL, INDICATORS    | <input type="checkbox"/> SAFETY EQUIP              |

**OUTSIDE INSPECTION (CHECK OPERATION OF:)**

- |  |   |
|--|---|
| <input type="checkbox"/> HOOD  | <input type="checkbox"/> OUTSIDE MIRRORS                                  |
| <input type="checkbox"/> BUMPERS, BODY DAMAGE                                  | <input type="checkbox"/> WHEELS & RIMS, TIGHTEN LUGS                      |
| <input type="checkbox"/> ALL LIGHTS  | <input type="checkbox"/> TIRES, CHECK WEAR, CRACKS<br>AND PRESSURE RECORD |
| <input type="checkbox"/> FUEL CAP  | LBS PER SQ IN   |
| <input type="checkbox"/> FRONT ENO, KING PINS, WHEEL<br>BEARINGS, TIE ROD ENDS |   |

**UNDER HOOD (CHECK OPERATION OF:)**

- |   |   |
|---|---|
| <input type="checkbox"/> AIR COMPRESSOR, MOUNTING<br>& BELT TENSION | <input type="checkbox"/> FUEL FILTER, CHANGE                                  |
| <input type="checkbox"/> STEERING GEAR & SHAFT (LUBE)               | <input type="checkbox"/> FUEL LEAKS, CORRECT                                  |
| <input type="checkbox"/> POWER STEERING HOSES<br>& OIL LEVEL        | <input type="checkbox"/> RADIATOR, CHECK LEVEL                                |
| <input type="checkbox"/> THROTTLE LINKAGE                           | <input type="checkbox"/> RADIATOR, PRESSURE CHECK                             |
| <input type="checkbox"/> WATER PUMP & FAN BELT                      | <input type="checkbox"/> RADIATOR CLEAN FRONT                                 |
| <input type="checkbox"/> WATER PUMP & FAN HUB (LUBE)                | <input type="checkbox"/> HOSES, CHECK & ADJUST                                |
| <input type="checkbox"/> C/CASE BREATHER, CLEAN/CHANGE              | <input type="checkbox"/> ANTI FREEZE PROTECTED                                |
| <input type="checkbox"/> AIR FILTER, CHANGE                         | <input type="checkbox"/> ALTERNATOR, BELT TENSION,<br>TERMINALS, CHECK & LUBE |
| <input type="checkbox"/> EXHAUST SYSTEM, TIGHTEN                    | <input type="checkbox"/> BATTERY CHECK/WATER LEVEL                            |
| <input type="checkbox"/> ENGINE OIL, CHANGE                         | <input type="checkbox"/> BATTERY CLEAN CABLES                                 |
| <input type="checkbox"/> OIL FILTER, CHANGI                         | <input type="checkbox"/> MASTER CYLINDER, FILL                                |
|   | <input type="checkbox"/> LUBRICATE ALL FITTINGS                               |

**UNDER CHASSIS**

- |   |  |
|---|--|
| <input type="checkbox"/> ENGINE & TRANS MTG BOLTS<br>CHECK & ADJUST                 | <input type="checkbox"/> EXHAUST MUFFLER, TAIL PIPE<br>HANGERS, TIGHTEN IF LOOSE       |
| <input type="checkbox"/> BODY MTG BOLTS<br>CHECK & ADJUST                           | <input type="checkbox"/> DIFFERENTIAL, CHECK GEAR OIL<br>LEVEL & CLEAN BREATHER        |
| <input type="checkbox"/> TRANSMISSION, CHECK GEAR<br>OIL LEVEL                      | <input type="checkbox"/> DIFFERENTIAL, CHECK FOR LEAKS                                 |
| <input type="checkbox"/> TRANSMISSION, CHECK COVER,<br>BILLET & SEAL AREA FOR LEAKS | <input type="checkbox"/> BRAKES, ADJUST IF NEEDED                                      |
|   | <input type="checkbox"/> SPRINGS, SHACKLES & BOLTS, CHECK<br>FOR CRACKS, RUST, TIGHTEN |

**DRIVE OFF & PARK**

- |  |  |
|--|--|
| <input type="checkbox"/> ENGINE OIL, CHECK LEVEL | <input type="checkbox"/> RECORD ALL PERTINENT INFO<br>IN VEHICLE RECORDS |
| <input type="checkbox"/> HOOD LATCH, CHECK       |  |

MECHANIC SIGNATURE \_\_\_\_\_

Figure IV-51

Form 2524 R  
(Rev. 5/60)

Figure IV-52

particular that any special vehicle maintenance instructions from your vehicle manufacturer should be incorporated into your forms system, as required.

## Passenger Amenities

This area concerns the facilities offered by the system for rider comfort. Research has shown that amenities can be among the most desired elements by potential customers for encouraging use of public transportation. To some, amenities are rider incentives, but they are looked upon by many potential riders as absolute necessities. The types of passenger amenities that will be discussed are those that are common to both large and small transportation systems, including:

Benches - Benches are most important, especially for systems whose headways, at times, are infrequent, which is often the case in smaller systems. Waiting does not seem as long if the person can sit and relax.

Shelters - Shelters obviously offer more protection than benches from the elements, and thus provide more comfort. They are more expensive than benches, but are very necessary for some people if they are to even consider riding the bus.

Direct-Line Telephones - Direct line telephones to customer information service are a convenience to customers when located at major stores, shopping centers, downtown, and other busy areas.

Customer Information Facilities - These facilities will vary according to system size and volume of pedestrian traffic. Customer information facilities can range from a centrally-located office that handles ticket sales and lost and found, to a general information display at a central location.

Central Transfer Points - This refers to one place, usually in a downtown area, where all routes meet. Central transfer points lessen the inconvenience of transferring.

## Goal

To expand short-range and long-range transportation customer amenities.

## Objectives

- . To build 10 additional on-route shelters meeting established design criteria; and
- . To plan for passenger information displays in key downtown locations.

## Projects and Activities

Keep in mind that any area directly affecting the public is a prime subject for consumer participation. Location and types of benches, shelters and other amenities may be improved by customer involvement in the decision-making process.

Benches and Shelters - Study all routes by bus stop locations and identify those areas that can accommodate benches or shelters and are heavy pedestrian traffic points. Establish design criteria, taking into consideration factors such as the environment around the stop; long-lasting, good wearing materials; customer needs (i.e., do they need a back on the bench?); maintenance requirements; and aesthetics. Obtain

information on custom-designed versus pre-designed models. Prepare specifications, obtain bids, and install.

Direct-Line Telephones - Locate sites that are major loading points and meet with businesses to determine the degree of cooperation that can be secured. Install lines and telephones in feasible areas.

Customer Information Facilities - Identify areas with pedestrian traffic that exceeds 300 people per day and are in proximity to transit service. Establish the need for an information unit by location, and determine the cost/benefit for each site. Then determine if bus routes can be altered to better accommodate various locations. Prepare design criteria, establish budgets, obtain funding, prepare specifications, and purchase and install customer facilities at feasible locations.

Central Transfer Points - Identify high density sites in terms of routing, traffic, and headways. Then determine the best locations for consolidating transfers. Design schedules for maximum riding convenience and trasnferring at these points, and prepare information displays for use at the sites. Consider displaying route names and numbers, scheduled departures, maps, and fare information. Provide the maximum customer convenience possible at each location.

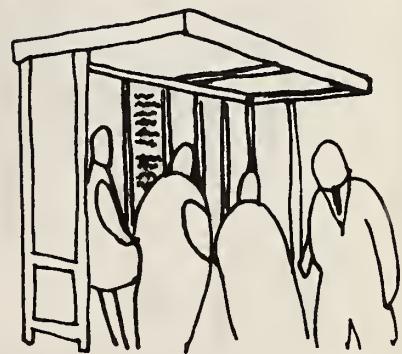
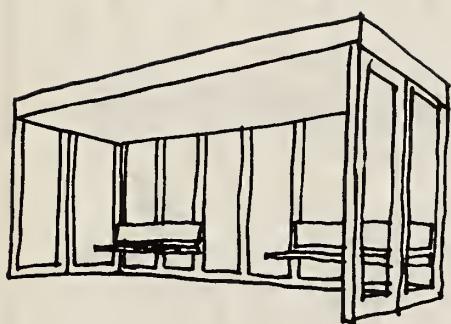
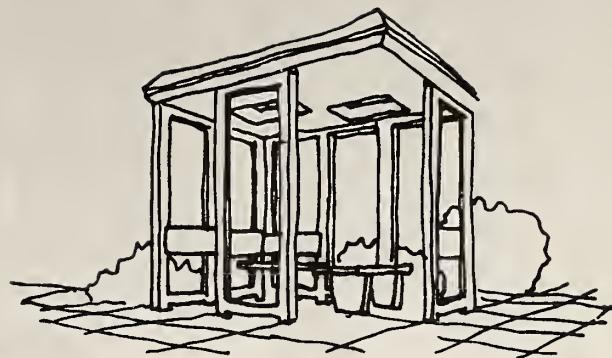
Once these amenities have been installed, it is necesary to keep them maintained. In the case of shelters, they need sweeping out, windows

should be kept clean, and damage must be repaired. Benches should be kept in good repair. Out-of-order telephones should be fixed immediately. Information facilities should be kept clean and comfortable; in the case of an information display, information should be kept updated and any damage to the display should be corrected immediately.

Remember, what the public sees is what it will believe. Your product's appearance will make a statement; make sure that the statement is what you want understood. It is also important to realize that good impressions are harder to make than bad ones or no impression at all. Each opportunity to reach the public must reflect a functional and positive image if new riders are to be attracted.

Figures IV-53, 54 and 55 are good examples of posters to advertise newly installed shelters.

/



SAMPLE SHELTERS

Figure 53

## SHELTER CONCEPT

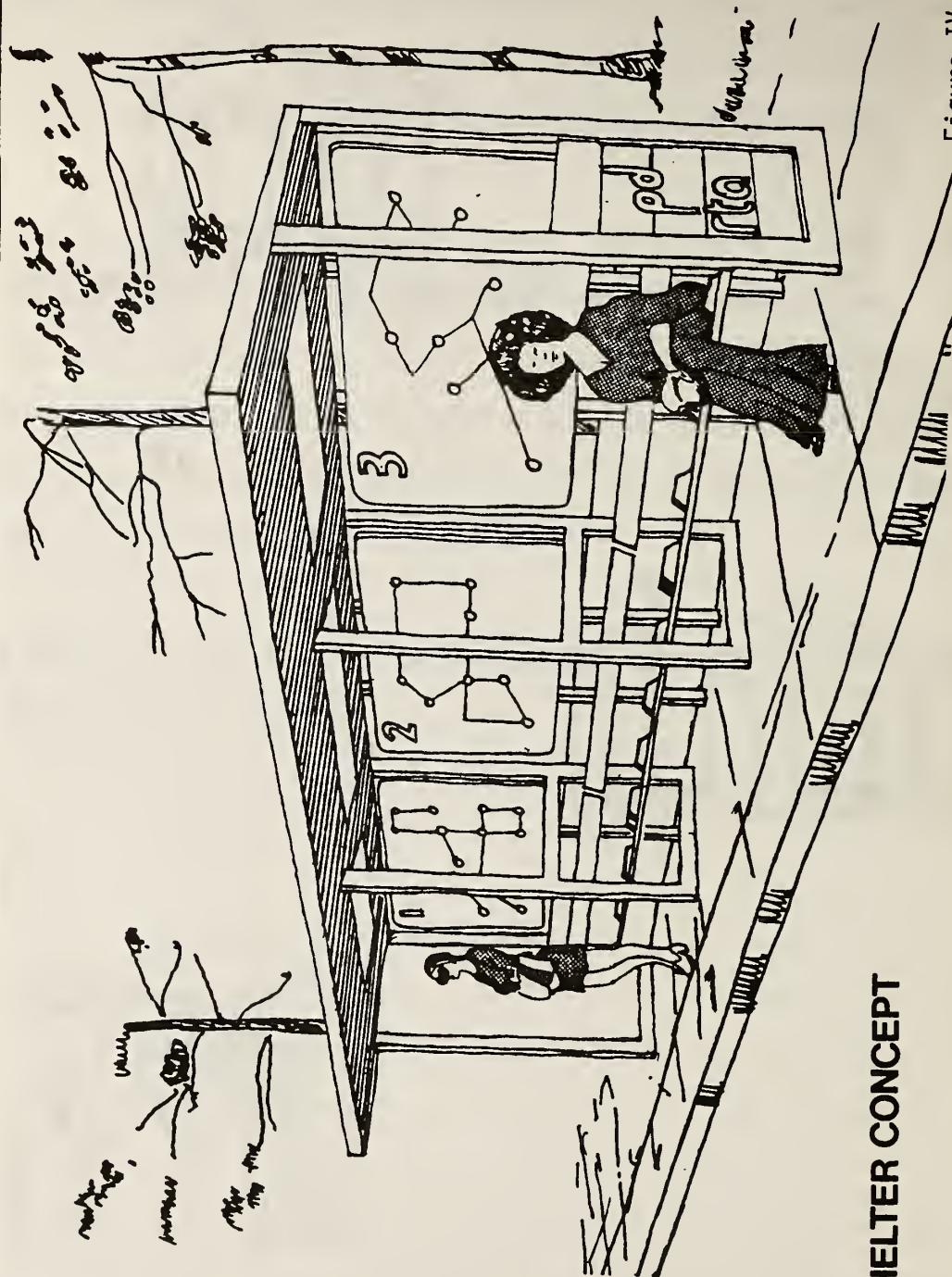
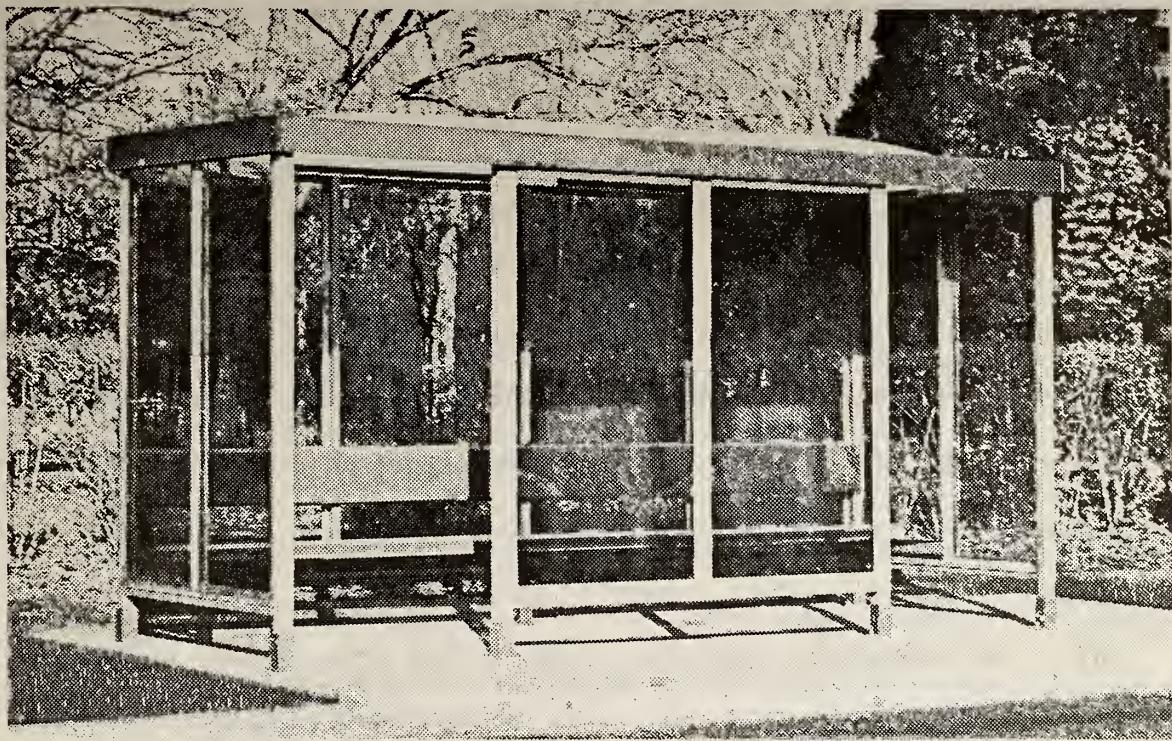


Figure IV-54



# **WAIT HERE.**

**We'll be along shortly.**

For your comfort, the first of many contemporary new shelters are springing up all over town. The tinted transparent walls allow an unobstructed view of the world around you while protecting you from whatever nature has to offer. The roomy seating area is a pleasant place to sit and engage in a little daydreaming, snoozing or just plain people-watching.

Don't get too comfortable though, 'cause, as promised, we'll be along shortly. Cutting down your waiting time is another thing we're doing for your convenience.

Charlotte Transit System is better'n ever. If you don't agree, let us know. Call 374-3366.



**Charlotte Transit System**

Charlotte's going places and Charlotte Transit'll get you there.

Figure IV-55

### Routes/Schedules/Services

In addition to the public information aspects of routing and scheduling covered in the Public Information section, the areas in the community served, times of operation, headways, and types of services offered are the most visible parts of the system to the public. It is obvious that these factors will affect community perspective and, in turn, ridership. The marketing responsibilities in this area are not to create the routes or to schedule the buses. Marketing responsibilities in this area (other than informational) are stated below:

- To identify potential customer problems with a new service, route, or schedule;
- To determine changing customer needs (e.g., if the local factor changes its shifts so that the current schedule is not convenient, it is a marketing responsibility to find that out and initiate schedule changes);
- To help rank-order necessary routing modifications; and
- To explore new services or expansions.

To accomplish these marketing responsibilities for routes/schedules/services, you must do some analysis. Some of the information you require will be available at local planning agencies; other information will have to be collected separately. You will need:

- Basic demographics by service area (population density, income per household, sex, age, etc.)

- Ridership statistics by area (trips by time of day, by type; mode of transit; loading figures at particular stops)
- Fares received by type (i.e., senior citizen fare, pass, etc.)
- Route characteristics by area (type of service, headways, mileage per passenger, costs per passenger)

With this data, you can then compare and match existing services to trips taken by other modes to better understand problems. For example, if you find that the majority of trips are made from Point A to Point B during the hours of 1:00 and 3:00 P.M., and you have only one trip during that time, you may need to re-evaluate the scheduling of that route. This may give you the answer you need, or you may be left with more questions. You can then prepare a simple on-board questionnaire to get the riders' opinions. This will enable you to intelligently consider rider desires in this area. You can also learn about rider needs in the following ways:

- Contact organized groups in the service area and review possible changes or additions;
- Periodically meet with large employment centers or shopping centers to review scheduling desires;
- Work with businesses to plan off-peak routing to coincide with shopping center activities or special promotions;
- Meet with recreational centers to work out convenient routing and scheduling;

- Evaluate, with business groups, other possible uses for off-peak equipment; and
- Work with social service agencies and taxi companies to establish common solutions.

When new or modified routes are decided upon, there are certain procedures to follow for implementing them with a minimum of fuss:

- Put out a press release about new service.
- Prepare a handout, leaflet, or brochure explaining the service. Be sure to let people know you did this to better serve them and that the changes are the result of some analysis.
- Put signs (small posters) in high pedestrian traffic areas, and even on the bus, as helpful reminders.
- Instruct drivers and information personnel to be extra patient with questions.
- When preparing materials, use a positive approach. Point out the benefits.

### Goal

To offer a convenient route and service structure to the greatest number of citizens within the current and adjacent service area, and convenient, easy-to-understand scheduling.

### Objectives

- To isolate geographic areas and groups, by demography and trip type, that might benefit by alternatives to local multiple-stop services;

- . To plan and implement varied services in keeping with the different trip needs by day part and community segment;
- . To project future service needs of outlying residents and consider alternatives to routes, equipment, and manpower allocations;
- . To increase community perception of route geography and geometry;
- . To match schedules to trip needs by geography, day part, week part, and type of trip;
- . To standardize headways, where possible;
- . To schedule changes to accommodate the community as well as operations;
- . To maximize use of current street and highway resources;
- . To make the most of existing services;
- . To explore ways to expand current service structure;
- . To explore service extension alternatives and establish service extension priorities; and
- . To review scheduling alternatives to meet potential trip demand.

## Projects and Activities

Again, keep in mind that marketing responsibilities in this area are limited. However, operations management and marketing must work closely to insure mutual understanding.

Increase Awareness of Existing Services - Make certain those living close to routes are aware of what services your system has to offer. Consider initiating a direct mail, or door-to-door information program for people within two blocks of existing routes. Orient all advertising toward promotion of good performance records and specific services. Keep your messages keyed to individual places people go. Do not emphasize a route number or name; push the activities on the route.

Off-Peak Program - Build awareness among special user groups of the availability of transportation service during off-peak hours. These groups should be listed, contacted, and their travel needs determined. Special user groups would include representatives of elderly groups, school clubs, business organizations, social groups, and even regular day-time shoppers. Prepare informational programs about regular service that can meet group needs, and begin to plan special services for special needs. (See the UMTA Off-Peak Ridership and Revenue Manual for more off-peak programs.)

Expand Services - Review the total (not just bus) trip origins, destinations, times, and purposes to better understand travel idiosyncrasies throughout the area with an eye to potential service expansion. Compare your system's route structure to the total trip flow in the community and prepare alternatives to better match community flow. Evaluate the effect of transfer connection changes, crosstown routes, and special shuttle services. Establish load counts to determine high use points over time for each route; then prioritize new areas by their potential to the system, given existing resources and reassigned or new resources. Proceed to development of a marketing program for the expansion.

Routing Improvements - Review resource availabilities to improve community service as determined to be desirable. Review probable priorities for change based on consumer input. Review logical changes and convert these to routing improvements alternatives. Remember to consider all routing improvements, including:

- Regular service extensions
- Extensions to other communities
- Feeder service or neighborhood-only service
- Adding peripheral or crosstown services
- Regularly scheduled, but unstructured, routing for residential areas
- Route deviation during off-peak hours to reach area shopping and activity centers

Cost "ideal" alternatives and review them in terms of preferential loading space and boarding area amenities (landscaping, telephones, benches, shelters).

Schedule Changes - Review the public's trip needs, times, and purposes. Characterize trip densities over time and match them to current transit schedule configurations. List prioritized schedule needs by time and geography. Develop accurate information on the impact of headways on ridership. Once this data is secured, establish standards on headways by time of day for minimum and maximum frequencies.

Plan schedule re-alignments to better serve peak demands and off-peak opportunities. Establish operational cost measurements on varying headways by day part and area, and then evaluate your ability to standardize headways for specific day parts.

Prepare all staff and the community for increased service. Plan to implement schedule increases on a staged basis. Once implemented, monitor the schedule changes for impact and increased use and revise as called for.

## Personnel

This area concerns the employees--from secretaries to mechanics to drivers--and how they can be a strong marketing force for the system. It is well-recognized that driver attitude highly affects the rider's image of the system. If the driver is courteous, the rider is more at ease, and the ride is a pleasanter experience. If the driver is surly and rude, the rider comes away with negative feelings about the system. The same situation is true for people answering the telephone, distributing passes or greeting visitors, and mechanics repairing damaged parts or cleaning the bus. Should they conduct themselves in a negative manner, it shows up in their work and the public perceives it.

It is a marketing job to be certain that the employees conduct themselves as customer-oriented, community service professionals. To accomplish this, there must be a good working rapport between management and the employees. If the employees do not respect management or are unhappy with management's decisions, they will develop poor attitudes toward their jobs. These poor attitudes then transfer into their dealings with the public. Therefore, steps should be taken to keep the working relationship between management and employees a positive one.

## Goal

To build a team of well-trained system representatives who are company, service, and community oriented, and who value their position in the community.

## External Objectives

- . To increase community awareness and perceived importance of system personnel;
- . To increase visual awareness of personnel;
- . To increase personal services to the public; and
- . To improve appearance and attitude of bus drivers.

## Internal Objectives

- . To increase perceived self-value of all system employee groups;
- . To build positive community, service, and company spirit and attitude; and
- . To improve communications among operations, management, and line personnel.

## Projects and Activities

Note that a policy and procedures manual was proposed at the beginning of this section. Remember that it has a critical role to play in personnel effectiveness, appearance and the resultant public perception of the system.

Employee Areas - Maintain clean, orderly working areas throughout the facility. The manner in which management maintains these areas can be perceived to reflect their attitudes on work performance. Tidy and orderly means clean and efficient. Dirty and mess means sloppy and slow. Design driver waiting rooms to have a pleasant atmosphere; this reflects the fact that the employee is an important person to the system.

Employee Incentives - Sponsor or organize team outings, events and recreation activities, such as baseball or basketball teams. This helps build friendships and helps keep employees happy. Recognize good employee performance with a meaningful reward (money, plaque, lunch, picture published in newspaper). This helps motivate employees to achieve job satisfaction and positive attitudes. Provide awards to employees monthly or annually in areas such as safe driver, most courteous, etc. Figures IV-56 and IV-57 may give you some ideas.

Encourage suggestions from employees. Let them know that they can help shape the system's future directions. Hold periodic seminars to

*Annual  
Transit  
Roadeo*

IN RECOGNITION  
OF PARTICIPATION

In the Charlotte Transit System Roadeo,  
this Award is presented to

DATE

---

---

---



Figure IV-56

# ANNIVERSARY ACHIEVEMENT

Charlotte Transit System does hereby certify that

has served ably and with distinction for

**On behalf of the Charlotte Transit System,  
we salute you on this momentous occasion.**

---

Anniversary Date

---

General Manager

emphasize employee's value and responsibility to the system and the community. Keep the employees informed of changes. Nothing is more frustrating or embarrassing to the employee than to not know about what the system is doing. First of all, this says to him that he is not part of a team effort; secondly, it makes him "look stupid." There are several methods for keeping employees informed, including:

- . Post information in central locations around the building at least one week ahead of proposed changes.
- . Prepare employee fact sheets containing information about proposed changes, and distribute them individually.
- . Publish information in the employee newsletter, if one exists.
- . Hold meetings to explain changes.

Establish an employee/management relations committee. This committee would help coordinate activities, solve problems, and make suggestions to keep the working relationship a good one. Prepare a monthly newsletter for employees. Make it by employees for employees, with only important information and a message from management.

Driver Identity - Appearance builds image, both in the mind of the customer and the employee. For this reason, some type of uniform is suggested. An opaque light windbreaker or lightweight poplin jacket ("warm, neutral" color) is recommended. An embroidered logo patch (symbol only) should be mounted on the left side of the jacket front

and/or on the right shoulder, to be seen by boarding passengers. The dimensions of the logo patch should be about 3 inches across. Perhaps a double-colored stripe could be wrapped around the left sleeve of the jacket, or some similar decor.

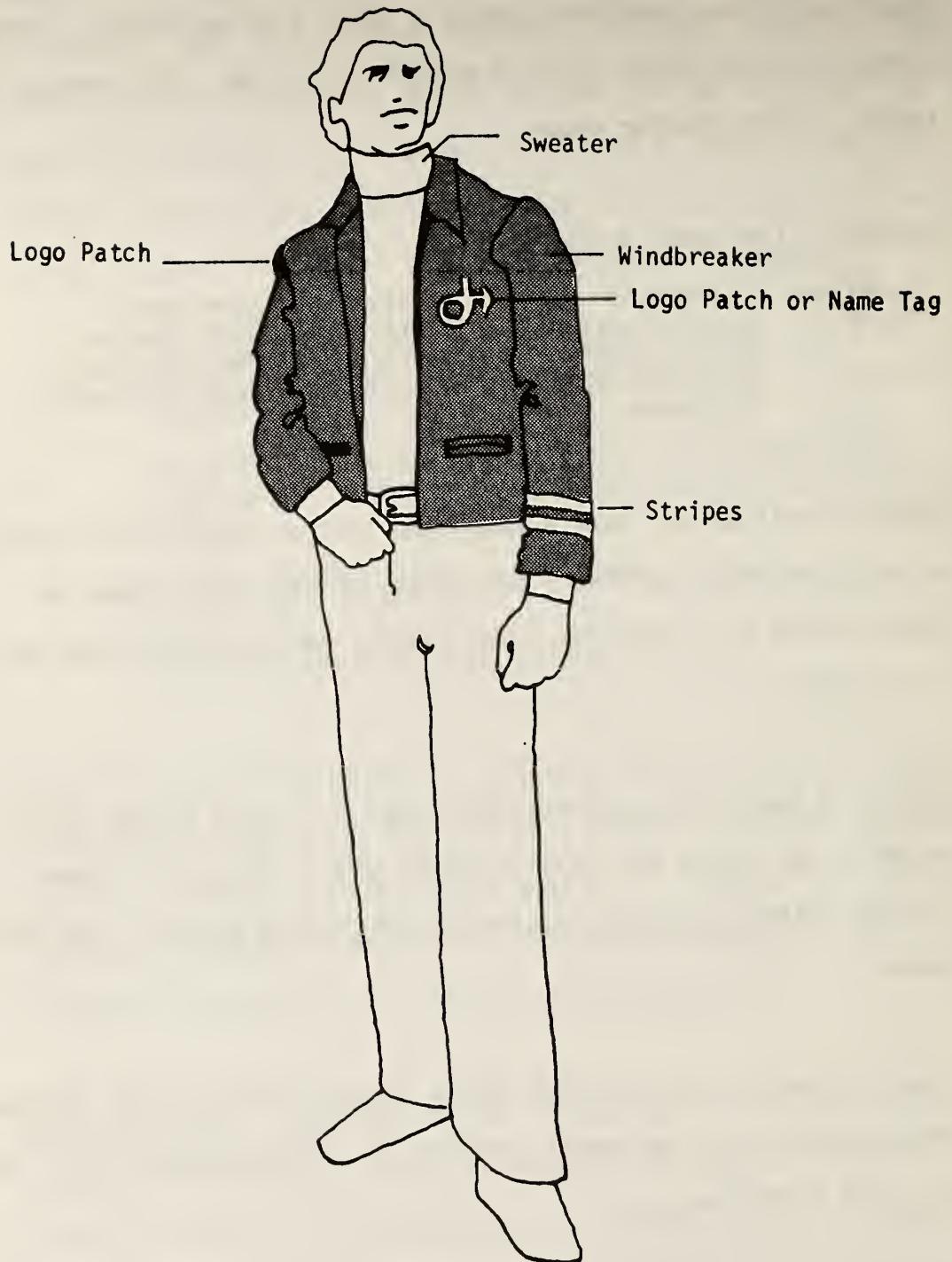
Typical poplin jacket availability:

Supplier:	JC Penney's	Color:	Warm gray
Style:	Raglan sleeves	Lining-face:	100% Acetate
	Quilted lining	Batting:	100% Polyester
Shell:	50% Polyester 50% Cotton	Care:	Machine washable

Jackets should be worn over a specified, colored shirt, top, or sweater--buttoned front, pullover, turtleneck, or cowl neck. Pants or skirts should be a light tan, beige, camel, sand or other "warm, neutral" color.

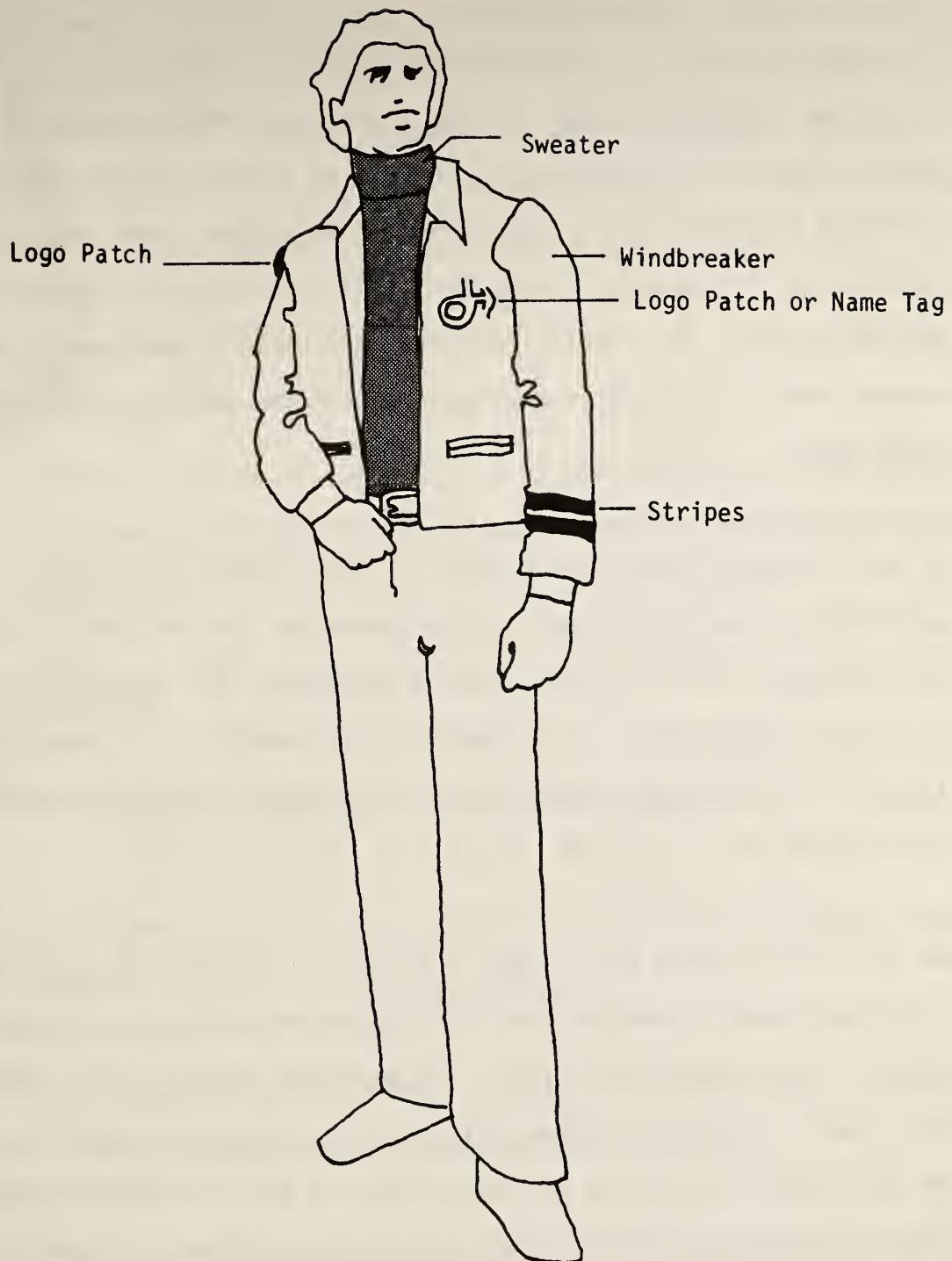
In lieu of the jacket, as described above, or in warm weather when a jacket is not called for, uniform shirts with a logo on the right shoulder, with appropriate matching or contrasting trousers, are recommended.

Figures IV-58 and IV-59 provide visual examples from the Alma, Michigan Demonstration Marketing Manual, prepared by Ilium Associates, Inc. for the State of Michigan.



DRIVER IDENTITY

Figure 58



DRIVER IDENTITY

Figure 59

## Plant and Maintenance

This area concerns the transportation system's own facility. The facility has a marketing value in that it stands as another symbol of the system's goals and impressions of itself. It is also the working environment of employees who must represent the system. Even though your facility may not be new, or even well-built, it can be and should be well-maintained. If a sloppy, run-down, and unclean appearance is tolerated, then you can expect employees to take the same attitude toward their work.

If your facility is very old and the building itself is decaying, make an attempt to have it at least look presentable. Not only will you and the employees find it a better working atmosphere, but the public will also react differently. No one wants to buy something in a store that looks dirty and sloppy. Chances are, the customer thinks the merchandise is like that. The same is true with the bus facility.

As far as the working environment is concerned, research has shown that a pleasant working atmosphere builds employee morale and work productivity. Don't dismiss that fact. The employees represent the system every day. If they are unhappy with their jobs, they may take it out on the rider. The working environment plays a part in whether someone likes his/her job, so if it is not acceptable, problems will develop.

Encourage tours from schools, organized groups, and local governmental leaders. Use the facility as a positive tool. Show them that the system wants to be, and can be, an important service to the community, just like the fire department. Be sure, also, that the facility has adequate identification, directional, and informational signage. Visitors should not have to wander the grounds trying to locate the manager's office or the place to buy passes.

### Goal

To instill a sense of individual pride and motivation to work toward achievement of overall system goals, and increase responsiveness to the general public.

### Objectives

- . To provide for visitor and tour considerations;
- . To develop an appropriate information system for buildings, departments, and access or support areas;
- . To actively seek maintenance department personnel input and suggestions as designs and developments take place; and
- . To investigate employee service area improvements, including space use factors and graphic design considerations.

## Projects and Activities

Keep in mind the idea that you want to show the employee and the public that the system is something to be proud of. Make your facilities an asset, not an eyesore to the community.

Field Trips - Establish a tour itinerary and schedule for visitors, providing for special standing areas and safety precautions, if necessary. Then, solicit field trips from schools.

Graphic Designs - Designate certain areas in all buildings to receive graphics. Adopt a policy to design and change all graphics once a year. Have employees vote or otherwise participate in the determination of graphic approaches or ideas.

Facility Signage - Identify signage requirements, and design a signage system, incorporating any newly adopted system identity graphic. Maintain and expand the graphics standards system as the need arises (facility signage must relate to on-street user information signage).

## Fares and Resources

The revenue sources and plans for soliciting funds, the prices charged, and payment methods used by the transportation system affect the community's response to the system. To the person on the street, fares and the idea of transit subsidies can cause frustrations. For example, if exact change is the only method of payment, the rider may be constantly annoyed by having to carry this exact change. His trip becomes a source of frustration, and he will not put up with it very long. In terms of resources, having to fund a transportation system through taxes or a bigger city budget may be a cause for resentment if people do not understand and appreciate the public transportation need. Further, it is important that an atmosphere of willingness to support reasonable transportation improvements through additional subsidies be ever-present in the community.

## Goal

To insure an ongoing, balanced (including special) fare structure that maximizes system use, ease of understanding, and fare accountability, considering system and service area expansions.

### Objectives

- . To create an atmosphere of willingness to support and provide subsidies for future public transit developments;
- . To increase the opportunity and availability of advance fare payment purchases;
- . To evaluate, plan, coordinate, and implement a permit and pass system that encourages peak and off-peak riding and involves all honored citizen groups;
- . To establish and implement expanded employee incentive programs with private businesses, governmental agencies, and system employees; and
- . To seek funding alternatives in addition to federal long-range subsidy sources.

### Projects and Activities

Like several other areas, fares are not a direct responsibility of marketing management. Once again, a close working relationship within the system is critical to the success of any implementation scheme.

Citizens' Committee - Appoint a citizen's committee, which includes community leaders, to make recommendations for future transportation

system directions. Have the committee develop alternative means of funding these developments, and work with government and political leaders to gain support for system development.

Public Information Campaign - Initiate a public information campaign and gear it to the significance of the scope of project development. Meet with all segments of the community to secure support, explaining the funding sources and reasons for employing these particular resources.

Fare Increases - Consider raising fares to increase system revenues. Package a fare increase with capital investments, especially amenities and more user information, or try to provide more service frequencies. Then sell it to the community. Attempt to provide a pass program that extends minimum fare increases only to the daily rider. Whatever you do, build it as a positive improvement program, not a negative issue, for all concerned. Give the public plenty of advance notice of any increases in fares.

Pass Program - Develop a monthly pass system; it is preferred by customers much more than any other payment system. Establish a pass cost that provides some discount to the purchasers if they use the bus more than 21 times per month. Encourage businesses, such as banks, to act as sales outlets. This will provide well-dispersed, convenient purchasing locations. Produce interior vehicle advertising cards that

designate sales outlets. Provide sales locations with a counter display card that states that this is a sales outlet. Work to increase pass sales each month.

## Planning

From a marketing standpoint, planning is important because developments take place in and around the city and have long-term effects on transit's opportunities. Lack of coordination with local planning efforts means missed opportunities. Taking advantage of opportunities will mean a better system for the community, a better image in the community, and as an end result, an increased share in market penetration.

Marketing is not to become involved with planning to usurp the responsibilities of the planners. Instead, it is there to offer the consumer's point of view, good business judgements, and results from market research that show the public's opinion on public transportation issues. Also, marketing should involve the public in development programs (once a plan is prepared) in order to publicize the effects on service in an understandable, positive way.

## Goal

To provide consistent surveillance of public and private developments and secure public transportation's position within them.

## Objectives

- . To maintain consistent surveillance of existing and potential route structures for optimum social and cost benefit;

- . To incorporate public transportation short- and long-range plans with long-range city planning efforts;
- . To coordinate public transportation access areas and facilities with governmental and private sector developments;
- . To provide technical assistance toward short- and long-range planning efforts of the public and private sectors; and
- . To improve communications on planning projects between operations and local agencies.

### Projects and Activities

Keep in mind that communication is a two-way street. The professional assistance available from local planning agencies can be invaluable.

Planning Department Contact - Collect information regarding short- and long-range city and regional goals, especially as it relates to transportation. Meet with planners from city, county and/or regional development agencies to explain your system's goals and objectives. Mail any brochures/newsletters and monthly status reports to planners as part of an information exchange. Obtain, read, and comment on material prepared by these agencies which relates to your system in any way. Attend and participate in meetings where transportation questions might arise. Keep in contact at least monthly.

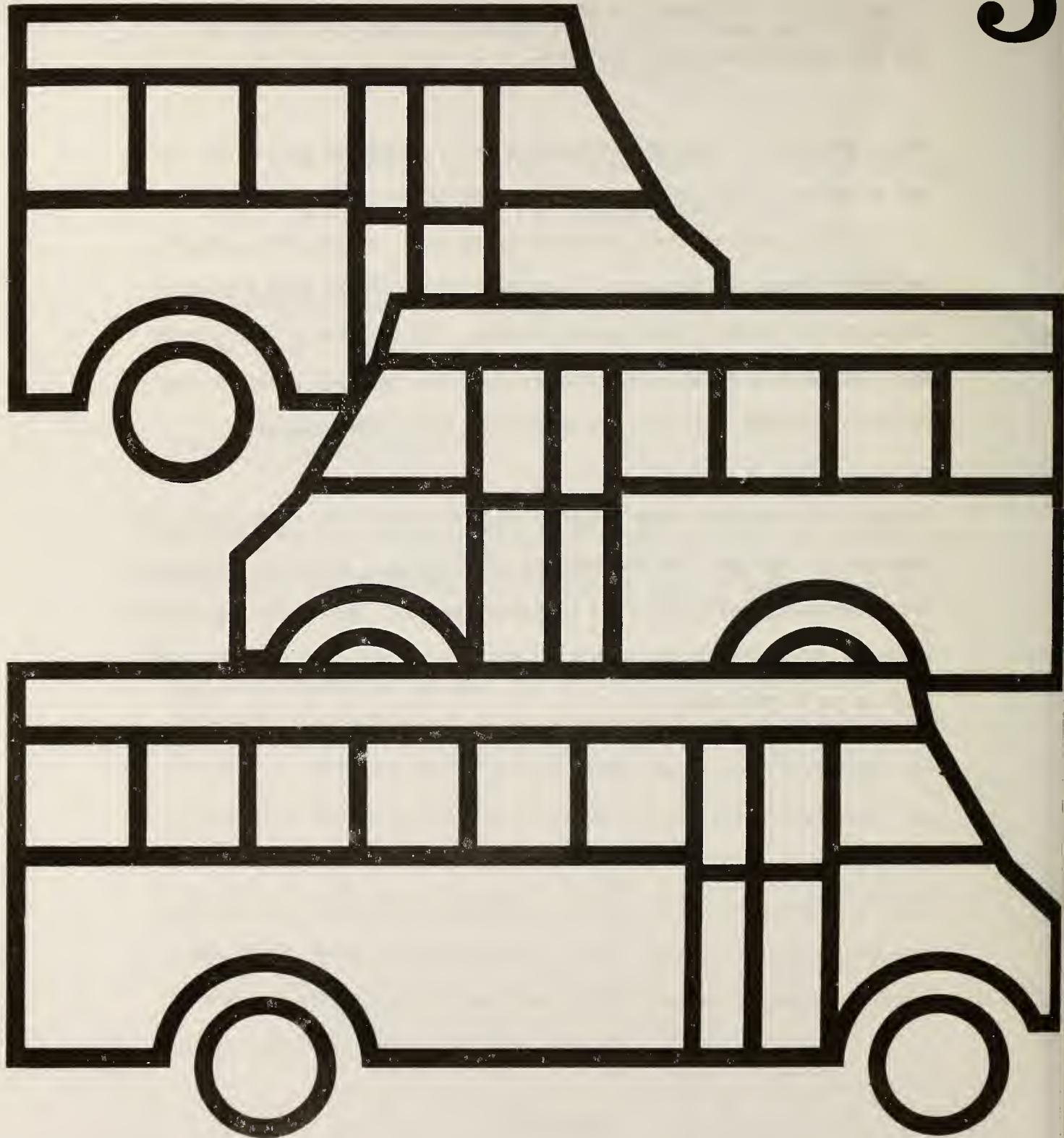
Transit Development Program (TDP) - Establish a plan for system improvements that you want to make each year. If necessary, put together slides and other visuals and set up community meetings for presentation of your plans. In short, do whatever is professionally appropriate to get the support and funds you need.

Start each year's program development early enough to gather the facts and supporters, but not too early to lose enthusiasm at budget time. If TDP's of three to five years are being used, update them annually and modify them, as necessary. No three-year plan is good enough to stand on its own for three years or more. If the size of the system does not warrant a full-time planner, utilize the city planners and retain a business planner on a short-term basis when needed.

Collect your research data and your success story; put them under your arm; and go out and gain the support of employees, citizens, planners, and government, political, and business leaders. Be certain to concentrate on major points of concern to each group you contact; show people what is in it for them.

# Implementation and Evaluation

5



## IMPLEMENTATION & EVALUATION

### Making the Marketing Process Work\*

In addition to the array of goals, objectives, and potential projects and activities presented in the last section, there are several parts of the marketing program process and procedure that require further detailing for those with little or no experience in marketing transit. As already stated, this manual is intended to provide the guidance necessary to insure the transportation system operator sufficient material to launch his own formalized marketing action plan and program. To do so, detailing in the following areas is included here: Target Marketing; Timing and Scheduling the Marketing Program; The Marketing Budget; and Measuring Marketing Impact.

#### Target Marketing

The concept of target marketing was touched on briefly in an earlier section of this manual, and presented as a "key strategic element" in the marketing process. One principal question involved in establishing a marketing approach is, "What groups of the public do I want to reach?" Target marketing is essentially the process of selecting those groups in your community that you believe are most likely to use public transportation, and then planning a way to get them on-board.

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\*This section was adopted, in part, from the Dial-A-Ride Demonstration Marketing Manual, prepared by Ilium Associates, Inc. for Alma, Michigan and the State of Michigan, Department of State Highways and Transportation.

While every transit system wishes to attract the mass market, it is highly useful to look at the customer base as a group of smaller sub-markets or target groups. This is referred to as segmentation by marketing specialists. A transit system may serve, for example:

- . a commuter segment
- . a shopper segment
- . a transit dependent segment
- . an elderly segment
- . a handicapped segment
- . a geographical segment, such as a sub-division outside the city or a multi-family housing project

Each segment may require different services at different times of the day, perhaps even different schedules or routing variations. Thus, each segment requires a different promotional scheme.

Once the operator has identified a target market, the next task is to find out some things about it, such as:

- . How many are there?
- . Where do they want to go?
- . When do they want to go?
- . What will they spend for service, etc.

This information need formulates your market research effort. Before you begin any market research, consider the fact that it is extremely important to be very rigorous about market research. If you intend to rely heavily on the results of the research effort, get an established market research specialist to assist you, preferably one with a

background in transportation marketing. Voluntary assistance from private enterprise and your local university or State transportation specialists is often an inexpensive way to secure some good technical assistance.

Keep in mind that survey results are only as good as the survey instruments and the sample taken. It is all too easy to build a bias into the survey itself or the sample without professional experience in its development.

A target marketing effort should be aimed at a specific group and fill a specific need. For example, most frequently, the goal is to increase off-peak ridership. So, you will want to aim your marketing effort at the housewife and the elderly, not the worker or youth in school. If your target relates to a time period, a close look at existing riders may help. The information in Figures V-1 and V-2 was developed by the Alma, Michigan Dial-A-Ride demonstration program and reflects two selected time periods.

A little more research might be even more revealing and provide additional facets to the question of off-peak ridership. For example, is routing and scheduling convenient relative to merchants' hours of operation, or health clinic hours, or to the purposes for which the elderly are traveling between 9:00 A.M. and Noon? If not, then perhaps routing and scheduling require revision prior to implementation of a marketing program for the elderly segment of the population.

IF YOUR "TARGET" PERIOD IS:

3:00 P.M. - 7:00 P.M.

<u>WHO TRAVELS</u>	<u>WHY THEY TRAVEL</u>	<u>ADVERTISING MESSAGE STRESS AREAS</u>	<u>ADVERTISING MEDIA</u>	<u>MERCHANDISING SUGGESTIONS</u>
Less Affluent (\$10,000 or less)	Grocery shopping, clothes shopping, medical	Convenience, waiting time, reliability, cost	Shopping guide, Newspaper - food section	Shopping centers Merchants Purchasing Discounts
Women (25-44)	Clothes shopping, medical, groceries	Cost, convenience, reliability	Shopping guide, Newspaper - food and fashion sections	Merchants
More Affluent (\$10,000 or more)	Recreations, clothes shopping	Cost, parking relief, convenience	Newspaper - business, financial sections	Coordinate with garden clubs, women's clubs, etc. Entertainment centers
Commuters	Return from work	Convenience, travel time, reliability, waiting time	Radio - drive time, news Newspaper - business, general news sections	Work subscription systems

Figure V-1

**IF YOUR "TARGET" PERIOD IS:**

**9:00 A.M. - NOON**

<b><u>WHO TRAVELS</u></b>	<b><u>WHY THEY TRAVEL</u></b>	<b><u>ADVERTISING MESSAGE STRESS AREAS</u></b>	<b><u>ADVERTISING MEDIA</u></b>	<b><u>MERCHANDISING SUGGESTIONS</u></b>
Housewife	Groceries, clothes shopping, medical	Cost, parking problems, convenience, comfort, waiting time	Shopping guide, newspaper - food, fashion sections	Shopping centers Merchants Coupons
Elderly	Groceries, clothes shopping, medical	Comfort, convenience, waiting time, cost, parking relief, safety	Shopping guide, Newspaper - human interest, editorial, features sections	Retirement homes Shopping centers Merchants Tours
More Affluent	Groceries, clothes shopping, medical	Cost, parking relief, convenience, comfort	Newspaper - fashion, financial, business, editorial sections	Shopping centers Merchants

Figure V-2

The complete time/travel overview for Alma, Michigan indicated that the time periods most needing increased ridership were in the late morning, late afternoon, early evening, and Saturday. Therefore, the improvements in the marketing program focused on responding to those groups who appeared the most appropriate target markets during these periods. The advertising and merchandising suggestions prepared for immediate use were mostly directed at these groups and were designed to expand general market awareness and support, as well as focus on certain improvement priorities of the target markets; that is, routing and scheduling revisions.

In conclusion, then, the concept of target marketing can greatly assist management in narrowing the focus of the marketing effort to those areas of high priority, and thus give direction to the overall marketing program over a given period of time. Through initial ridership surveys and periodic follow-up, the success or failure of a particular marketing strategy can be determined and changes in strategy or revision in approach initiated.

#### Timing and Scheduling the Marketing Program

When the initial steps of preliminary research and formulation of goals and objectives have been taken, marketing techniques must be selected and planned for implementation. At this stage, it can be helpful to lay out an action plan summary so that all participants (including

commissioners, employers, advisory groups) can be made fully cognizant of the anticipated marketing activities to be programmed. The following summary of a marketing action plan (Figure V-3), along with the calendar presented in Figure V-4, will serve to make an effective display and presentation at a glance:

Figure V-3  
Summary of Marketing Program by Goal

Goal	Marketing Techniques		
	Market Research	Advertising/Promotion	Community Relations
Increase peak Ridership	<ul style="list-style-type: none"> <li>. employee surveys</li> <li>. employer surveys</li> </ul>	<ul style="list-style-type: none"> <li>. Free ride coupons</li> <li>. Radio announcements</li> </ul>	
Increase off-peak ridership of special groups	Current ridership	<ul style="list-style-type: none"> <li>. Special fares to handicapped &amp; seniors</li> <li>. Nickel week in cooperation with merchants' summer sale days</li> </ul>	Meet with all senior groups and service agencies to promote use of service for medical and shopping trips on relevant routes
Increase public recognition		All forms of media	Logo design contest
Increase awareness of service availability		<ul style="list-style-type: none"> <li>. Design new system maps</li> <li>. Printed schedules</li> <li>. Interior bus cards showing routes and schedules</li> </ul>	Establish and carry out distribution program for new service-related materials

As noted earlier, several well-selected and well-planned marketing schemes each year should be adequate for most transit systems. Once chosen and detailed, each component part of the marketing project should be carefully timed to insure full and complete preparation, launching, monitoring and evaluation. For this purpose, and to aid in the budgeting of personnel and money, a marketing project calendar is recommended.

Where the marketing action plan is composed of several components, it may require more sophisticated approaches to insure all details of the projects are implemented in a timely fashion. For this purpose, a matrix-type calendar is suggested, such as the example below. Through the three code symbols, the actions can be identified according to the specific marketing area or project being undertaken. Do not forget to schedule all monitoring and evaluation activities as well.

Figure V-4  
Marketing Project Calendar (By Week)

Project	Month I				Month II			
	1	2	3	4	5	6	7	8
1. Visual Identity	*	*	*					
2. Operations Forms								
3. Advertising	*	#	#	#	#	#	X	X
4. Vehicle Design (See#1)					*	*	*	
5. Telephone Guidelines								
6. Driver Training				*	*			
ETC.								

Legend:  
\*Plan & Procedure Materials  
#Implementation/Continue  
XTabulation/Analysis

## The Marketing Budget

A committed allocation of funds for the accomplishment of a creative, well-directed marketing program represents a commitment to success.

The marketing budget should be coordinated with the marketing plan, but should be prepared only when the plan is in the final stages of development. Dollar estimates should be attached to all the activities set forth in the plan to arrive at a total budget figure. This total figure must then be reviewed with respect to its reasonableness relevant to the total transit system budget. If reductions are required, they should be made based on the priorities that were established for the marketing program's goals and objectives.

As noted in an earlier section, marketing has (until recently) traditionally received rather low priority in overall transit system budgets compared to other sectors of the economy. Generally speaking, two to four percent of overall transportation system budgets are allocated to marketing compared to ten to twenty percent in most manufacturing areas.

In August 1979, Volume 5 of the Section 147 Rural Public Transportation Demonstration Manual presented the marketing program results of 102 Section 147 programs. These projects had marketing budgets that ranged from three to five percent of the total operations costs of the systems. Some other guidelines were presented in the 1980 summer issue of Transitions, published quarterly by ATE Management and Service Company,

Inc. In an article by Janet M. Lang, Director of Marketing for ATE, entitled "Marketing Guidelines," the following budget guidelines, derived from an analysis of transit systems throughout the United States, were suggested:

- Marketing budget per peak vehicle = \$800 to \$1200
- Amount of line revenue generated for each marketing dollar spent = \$13.00 to \$16.00
- Marketing budget per rider (excluding transfers) = \$.015 to \$.02
- Amount per person in the system's service area = \$.22 to \$.25

To return to the analysis of the Section 147 Projects, the cost of developing the marketing program for a rural public transportation system varied from area to area depending on the local costing situation. The cost of the marketing program also varied depending on the stage of development in which the transportation system was involved. The development stages of a marketing program--initial concept and design, point of production and ongoing labor, maintenance and promotion--each require a different level of investment. Within each stage, this investment will be spread over salary costs, consultant costs, overhead costs and other direct expenses. A typical spread of costs for an ongoing marketing program was depicted as follows:

Salaries	61%
Consultant Services	5%
Printing/Materials	19%
Advertising	7%
Merchandising	4%
Other Direct Expenses	4%
Total*	<u>100%</u>

\*Representing 3-5% of system operating cost.

During the initial stage of the marketing program, a skewing of the cost spread to emphasize preparation and production would be expected, and might occur throughout the first several years of service development.

The marketing program is the link between the consumer, the rider, the product and the system's operation. The investment in a marketing program for a public transportation system is essential for system success. Appropriate allocation of funds, accurate costing of projects, and establishment of component priorities in a well-designed marketing program will ensure the greatest return on the investment.

With the task budgeting approach suggested in the following pages, the attainment of a specified set of goals is contingent upon the availability of the resources needed to achieve these goals. For example, ridership cannot be increased by five percent during peak hours if sufficient equipment capacity is not available. The same conditions apply to the achievement of advertising. This illustrates a very common budgeting problem: whether to establish the available resources and then adopt appropriate goals that can be fulfilled with these resources, or to define logically-attainable goals and then determine the resources that will be required to attain them.

There is no simple answer to this problem. The most commonly used procedure is to explore the possibilities at each end of the spectrum and then attempt to reach a reasonable balance or compromise.

A good marketing budget reflects considerable discipline and commitment. The temptation is strong, particularly in the transportation industry where there is no historical commitment to marketing, to consider the marketing budget one of the more flexible elements in the total budget. Accordingly, whenever financial troubles arise, the marketing budget is frequently the first to be cut; it is more difficult to fire people, defer maintenance, or cancel orders for new equipment than it is to eliminate research projects, cut back on advertising, cancel promotions, or reduce information services. This tendency should be resisted; the marketing budget should be examined on its merits, in competition with other transit functions, and not arbitrarily cut simply because it is concerned with intangibles.

Development of the marketing budget requires consideration of two elements: the total amount of money to be devoted to marketing and the allocation of portions of the total to various marketing functions. The marketing program budget can be defined as the cost of all actions required to achieve the transit system's marketing goals, including all expenditures for each function (market research, service development, advertising and promotion, and customer services). There are three methods generally used to establish marketing budgets: subjective budgeting; percent-of-sales budgeting; and task budgeting.

When subjective budgeting is used, management decides, generally on the basis of judgement and experience, how much money to allocate to each major function, including marketing of the transit system.

When the percent-of-sales approach is used, again, management decides, on the basis of judgement and experience, to allocate a specific percentage of sales revenue to marketing. This procedure is relatively simple and can be modified based on prior year efforts and results. A major problem with the percentage-of-sales revenue approach, however, is that it considers marketing as merely a dependent variable; as a result, marketing expenditures are often curtailed as sales fall. Such a result is very unfortunate because a period of declining revenues may very well indicate the need for increased marketing expenditures.

The task budgeting approach is the most desirable of the three. It recognizes that the purpose of marketing is to help achieve designated goals and that the amount budgeted for marketing is the investment considered necessary to achieve those goals. A budget decision based on this approach is consistent with the planning techniques discussed previously. It takes into account the desired task and provides the marketing function with the funds required to accomplish it.

The basic budgeting consideration is, "What is needed to do the job?" In using the goal, or task, method of budgeting, the first step is to identify the various marketing activities that must be performed in order to achieve the stated goals. The next step is to determine what each of these activities will cost. For example, the amount of advertising required for each marketing goal and strategy during the year ahead must be established and the cost of this level of advertising

must be determined. Similar determinations must be made regarding the requirements and costs for promotion, information services, and other activities for each goal and strategy.

### Measuring Marketing Impact

Evaluating the effectiveness of any marketing program is the key to refinement of the program and the development of research data for the introduction of future marketing projects. Marketing must return something on its investment if it is to be worthwhile.

As noted in the beginning of this manual, planning and implementation go hand-in-hand in a cyclical process throughout the marketing project. A diagrammatic presentation of this process is set forth on the following page.

Figures V-5, 6, 7 and 8 are adopted intact from the Marketing Manual for Transit Operators, February 1979, prepared for the Iowa DOT, Public Transit Division, by Ilium Associates, Inc. They are designed to help you monitor, or check, the value of your marketing projects. Marketing project successes/failures cannot be measured merely by cost or even by direct ridership gains alone. How decision-makers, employees' (morale) and riders' (behavior) are affected by transit efforts are equally important points that must be measured. The procedures outlined below are designed to assist you in monitoring your marketing program.

Figure V-5

AWARENESS AND ATTITUDE QUESTIONS

1. Please indicate:  
a. What the fare is \_\_\_\_\_  
b. What the transfer cost is \_\_\_\_\_  
c. The color of the city buses \_\_\_\_\_  
d. The shape of bus stop signs \_\_\_\_\_  
e. The color of bus stop signs \_\_\_\_\_ (tabulate as public or private response)
2. Who owns the bus company? \_\_\_\_\_
3. Who manages the bus company? \_\_\_\_\_
4. Please tell me what advertising for the transit system you can recall: \_\_\_\_\_
  
5. In what media have you last seen or heard the transit system advertised?  
Newspaper \_\_\_\_\_ Radio \_\_\_\_\_ TV \_\_\_\_\_ Mail \_\_\_\_\_  
Outdoor \_\_\_\_\_ Other \_\_\_\_\_

NOTE: The following questions can be used as time and the situation will allow.

6. Public transportation is noisy.  
Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_  
Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_
7. Public transportation is uncomfortable to ride.  
Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_  
Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_
8. Riding public transit takes too long.  
Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_  
Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_
9. Transit should offer such things as toy bus banks to get people to ride.  
Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_  
Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_
10. Pollution and energy consumption could be reduced if more people took public transportation.  
Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_  
Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

11. I wouldn't know at which stop to get on when taking public transportation near my home.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

12. Information on how to use the transit system is easy to understand.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

13. Everyone who possibly can should use public transportation.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

14. Public transit should be free like police or fire services.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

15. Even without a bus schedule, it is easy to find out where to catch a bus.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

16. One can rely on scheduled service when using public transportation.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

17. I can relax while I use public transit.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

18. I would prefer to drive an automobile in the city any day rather than take a bus.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

19. In your opinion, the transit system provides the best service it can with the funds it has available.

Strongly Agree \_\_\_\_\_ Agree \_\_\_\_\_ Neither Agree nor Disagree \_\_\_\_\_

Disagree \_\_\_\_\_ Strongly Disagree \_\_\_\_\_

20. Do you think fares for public transportation should be kept low with tax subsidies from such sources as (check as many as are appropriate):

\_\_\_\_\_ the city \_\_\_\_\_ sales tax \_\_\_\_\_ vehicle registration tax

\_\_\_\_\_ the federal government \_\_\_\_\_ gasoline tax \_\_\_\_\_ none of these

\_\_\_\_\_ property tax \_\_\_\_\_ business tax \_\_\_\_\_ no taxes for transit fares

**Figure V-6**  
**GENERAL INFORMATION**

1. What is your age? Please circle the appropriate age group.

Under 15      15-24      25-34      45-54      55-64      Over 65

2. Are you male or female?

Male \_\_\_\_\_ Female \_\_\_\_\_

3. How is most of your time spent? (Check one)

Employed outside the home \_\_\_\_\_

A homemaker \_\_\_\_\_

A student \_\_\_\_\_

Retired \_\_\_\_\_

Other \_\_\_\_\_

4. If employed outside the home, would you please check the response that best describes your work?

Professional - managerial and related \_\_\_\_\_

Craftsman - foreman and related \_\_\_\_\_

Clerical service and related \_\_\_\_\_

Operatives including transport \_\_\_\_\_

Laborers except farm \_\_\_\_\_

5. Farmers and farm management \_\_\_\_\_

6. What is the highest level of formal education you have completed?

Elementary \_\_\_\_\_ High School \_\_\_\_\_ Vocational or specialized training \_\_\_\_\_

College - 1 to 3 years \_\_\_\_\_ College - 4 years or more \_\_\_\_\_ Graduate degree \_\_\_\_\_

7. Would you please check the category that most closely corresponds to your family income?

Under \$4,999 \_\_\_\_\_ \$5,000 - \$7,999 \_\_\_\_\_ \$8,000 - \$10,999 \_\_\_\_\_ \$11,000 - \$14,999 \_\_\_\_\_

\$15,000 - \$24,999 \_\_\_\_\_ \$25,000 - \$49,999 \_\_\_\_\_ More \_\_\_\_\_

8. Home address \_\_\_\_\_

9. Work address \_\_\_\_\_

10. How many motor vehicles belong to the members of your household?

none \_\_\_\_\_ one \_\_\_\_\_ two \_\_\_\_\_ three or more \_\_\_\_\_

11. How often do you ride a bus?

Several times a week \_\_\_\_\_ Once a week \_\_\_\_\_ Once or twice a month \_\_\_\_\_

Several times a year \_\_\_\_\_ Never \_\_\_\_\_

**Figure V-7**  
**RIDER TRIP CHARACTERISTICS**

1. Route number of contact \_\_\_\_\_
2. Direction of travel \_\_\_\_\_
3. Time of day \_\_\_\_\_  
Day \_\_\_\_\_
5. Origin:  
Home \_\_\_\_\_ Work \_\_\_\_\_  
Store \_\_\_\_\_ Other \_\_\_\_\_
5. Destination:  
Work \_\_\_\_\_  
Shop \_\_\_\_\_  
Recreational \_\_\_\_\_  
Personal \_\_\_\_\_
6. Trip distance:  
Less than 1 mile \_\_\_\_\_ 1 - 5 miles \_\_\_\_\_  
5 - 10 miles \_\_\_\_\_ More than 10 miles \_\_\_\_\_
7. Perceived round-trip travel time:  
15 minutes \_\_\_\_\_ 30 minutes \_\_\_\_\_ 45 minutes \_\_\_\_\_  
60 minutes \_\_\_\_\_ More \_\_\_\_\_

**Figure V-8**  
**NON-RIDER TRIP CHARACTERISTICS**

1. What is your current mode of travel?

Auto \_\_\_\_\_ Bicycle \_\_\_\_\_ Taxi \_\_\_\_\_ Walk \_\_\_\_\_ Other \_\_\_\_\_

2. Trip characteristics - same as rider questions 5, 6, and 7 from previous page.

3. When was the last time you rode the bus?

Last week \_\_\_\_\_ Last month \_\_\_\_\_ A year or so \_\_\_\_\_ Never \_\_\_\_\_

4. What do you like **least** about public transit? (Check one or more.)

Too slow \_\_\_\_\_ Crowded \_\_\_\_\_ No direct route \_\_\_\_\_

Uncomfortable \_\_\_\_\_ Too expensive \_\_\_\_\_ Driver attitude \_\_\_\_\_

Dirty \_\_\_\_\_ Inconvenient \_\_\_\_\_ Dangerous \_\_\_\_\_

Noisy \_\_\_\_\_ Other riders \_\_\_\_\_ Odors \_\_\_\_\_

Outlined earlier in this manual are some basic analysis-gathering steps. Refer to these for compiling a data base of reference information. This information is what you will use later to make comparisons with the new information you gather to determine your status. Some basic information you can use to establish a data base includes:

- . The number of daily, monthly, and seasonal telephone calls;
- . The ratio and types of calls received, who makes them, and where the callers live;
- . The number of timetables and other information aids printed and distributed;
- . The number and tone of editorial lines on public transit prepared by local media;
- . The number of riders by type, day part, week part, monthly, and route (segment);
- . The revenue by time of day, by month, and route, if possible; and
- . Employee turnover and sick leave ratios.

Essentially, there are two ways to gather this and other information: by observing and recording behavior, and by involving the system user in the process. The latter is preferable because you will be able to gather specific marketing information, such as awareness and satisfaction levels. If you do not have the time or budget to gather this information, encourage others (like City planners, COGS, or others) to gather it for you, or to give you the funds to do it. The techniques to perform this information gathering are as follows:

### Observation

- Driver counts (written, through farebox or self-contained rotating counters);
- Checker (temporary employee);
  - General rider characteristics (age, sex, origin, destination)
  - Trip characteristics (time, distance, on-board behavior (interaction);
  - Vehicle loading on specific routes and route segments;
  - Auto or other transportation mode counts at key intersections, parking lots

### System User Involvement

- Telephone interviews
- Work center/recreation center interviews
- Shopping center/recreational center interviews
- On-street interviews
- Direct mail questionnaire--geographic selectivity
- In-person handout--return requested
- Home interviews

On the following pages are questions that you can use for guides in creating your own questionnaire for measuring marketing program progress. These questions are broken into sections so that you can create short or long versions of questionnaires, whichever suits your needs. Be sure to mix in your own ideas with these questionnaires so you can test them before you go to the expense or trouble to put them into

effect. Do not be concerned about using these questions or variations on your employees. While the data you collect will not be as accurate as a professional source could provide, some information is much better than no information. As you begin to collect and use information, you are going to gain confidence in your decisions and find less subjective resistance interrupting your programs.

Whichever technique is selected, it should be instituted immediately. The first tabulation of results form what is referred to as "baseline data." This is the transit operations' position before instituting improvements or initiating a marketing effort. The following table (Figure V-9) is from the Alma, Michigan Dial-A-Ride Demonstration Project. This example format provides a simple tabulation of the opening situation (at project start) in key areas where improvements are anticipated through the marketing effort.

A similar baseline data summary should be prepared as part of the initial research effort leading to the development of a marketing plan. Each time interim project monitoring is completed, results should be tabulated, entered in the appropriate columns, and reviewed for progress. Thus, the effect of specific service changes or advertising and promotions can be monitored periodically, providing a check against the achievement of the specific goal originally established in any given area.

Figure V-9  
BASE DATA

ALMA

General Market:		<u>TOTAL</u>	<u>RIDER</u>	<u>NON-RIDER</u>	<u>MALE</u> <u>25-44</u>	<u>FEMALE</u> <u>25-44</u>
<u>Awareness</u>						
"Positive Impressions"	...1	86%	96%	82%	93%	88%
"Who Uses D.A.R.T. (Everyone)"	...2	40%	46%	37%	33%	43%
<u>Support</u>						
"Satisfied (Good-Very Good) With"						
. Information	...3	58%	75%	50%	71%	55%
. Waiting Time	..4	52%	71%	43%	59%	47%
. Riding Time	...5	50%	73%	40%	56%	44%
. Access to Phones	...6	45%	64%	36%	33%	44%
. Hours of Service"	...7	57%	78%	47%	56%	60%
"Ride More?"	...8	30%	39%	26%	41%	31%
<u>Use</u>						
"First Time"	...9					
"How Often (Weekly)"	..10	4%	11%	-	4%	2%

### What Next?

While the framework, guidelines and examples of various aspects of marketing are presented throughout this manual, no amount of paper is going to make things happen. At this point, two things are necessary. One is that transportation system management commit itself to an organized marketing effort; and the second is to provide the level of personnel effort required to give marketing your system the attention it deserves.

Take these two steps, put this manual in the hands of your assigned marketing planner, then get your plan and program together. Remember, regardless of the scale of your program or the resources available, you have to get the non-rider to try it and like it before your public transportation system can claim success.

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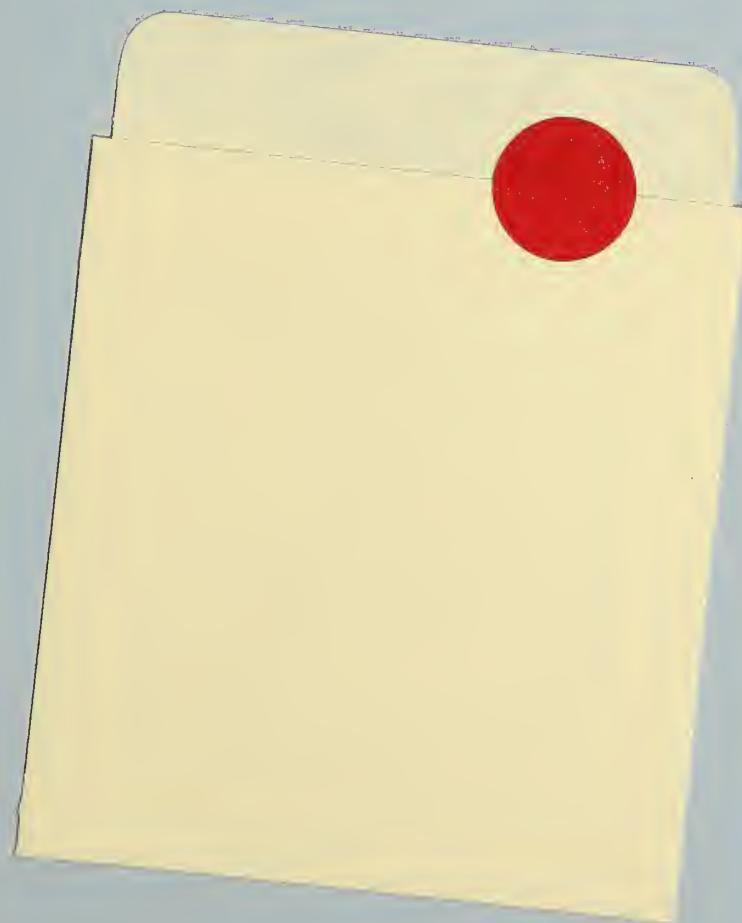
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